**SERIES PURPOSE:**
The purpose of the OBM shared services associate occupation is to process & review financial transactions &/or maintain financial accounting records for state agencies & other public entities, perform on-line OAKS inquiries & develop queries/reports &/or perform related customer service functions in an environment with intense & public focus on high performance & individual & team measurement.

NOTE: This series may perform other financial transactions & processes as mutually agreed upon with the applicable collective bargaining agreement.

This classification series is restricted for the use by Office of Budget Management only.

<table>
<thead>
<tr>
<th>JOB TITLE</th>
<th>JOB CODE</th>
<th>PAY GRADE</th>
<th>EFFECTIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Services Associate</td>
<td>66521</td>
<td>28</td>
<td>9/16/2018</td>
</tr>
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</table>

**CLASS CONCEPT:**
The full performance level class works under minimal direction & requires considerable knowledge of financial processes & practices in order to perform any or all of the following financial transactions (e.g., process & review financial transactions &/or maintain financial accounting records for state agencies & other public entities, perform on-line OAKS inquiries & develop queries/reports &/or perform customer service functions &/or administrative functions related to financial transactions).
### JOB DUTIES IN ORDER OF IMPORTANCE:
(These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

Performs any or all of the following financial transactions: processes & reviews financial transactions &/or maintains financial accounting records for state agencies & other public entities; performs on-line OAKS inquiries & develops queries/reports &/or performs customer service functions &/or administrative functions related to financial transactions (e.g., provides routine &/or complex information & resolves routine &/or complex complaints from state agencies, suppliers & other public entities; operates & accesses OAKS financials to research responses to inquiries; answers telephone inquiries from state agencies, suppliers & other public entities regarding financial processes & services provided by OBM Shared Services Center; communicates with state agencies, suppliers & other public entities to investigate & resolve financial transactions issues; resolves questions & issues during first-time call; routes calls to appropriate department for continued assistance &/or creates help desk cases for more complex issues; partners with other SSAs &/or teams to assure customer inquiries are resolved; on behalf of state agencies, boards, & commissions, creates, modifies &/or cancels vouchers in OAKS; resolves voucher exceptions with state agency boards & commission employees; processes, reviews & audits financial transactions & travel reimbursements for appropriateness & compliance with state of Ohio policies & procedures; maintains & updates supplier master information; resolves invoice discrepancies with suppliers; validates information for accuracy & completeness within established deadlines; resolves exceptions as necessary; facilitates payments via electronic funds transfer (EFT); solicits & maintains banking information for suppliers; logs returned documents & reasons for delayed processing; performs reconciliation of daily revenue receipts by funds, groups & account codes with Treasurer of State offices; verifies all vouchers processed successfully in nightly batch; checks reports for outstanding vouchers & contacts agencies when necessary to verify information; makes error corrections in OAKS; prepares information received for manually kept or computerized records; maintains accounts, records & files as needed; organizes, prioritizes & processes Shared Services transactions; creates & maintains documents; logs information into databases & performs inquiries & simple analyses; operates equipment & machines such as copier, computer, telephone & scanner as necessary; participates in multi-discipline &/or cross-functional special project teams to drive continuous improvement efforts; assists Shared Services Center leadership & team leads as necessary.

### MAJOR WORKER CHARACTERISTICS:
Knowledge of state accounting practices*; generally accepted accounting principles (GAAP); agencies’ financial policies, procedures & controls*; general office practices & procedures; workflow analysis & financial concepts. Skill in computer use including completion of financial transactions; management of customer inquiries; report preparation using word processing, spreadsheet & other business software. Ability to add, subtract, multiply, & divide fractions, percentages & decimals; understand state accounting procedures; maintain accurate records; gather, collate & classify data & information; assemble data into reports; research questions about financial transactions & answer complex telephone inquiries; participate actively in &/or lead self-directed work teams with minimal supervision; maintain composure under pressure while meeting multiple deadlines in an environment with intense & public focus on high performance & individual & team measurement; take initiative, provide suggestions, feedback & coaching to co-workers for improvement while maintaining productive working relationship with co-workers, other state employees & customers of Ohio Shared Services center; participate in multi-discipline &/or cross-functional special project teams; effectively communicate orally & in writing; identify areas of improvement &/or solutions to system processes; have excellent self-management, including ability to self-critique, gather critiques of others & incorporate feedback for improved performance.

(*) Developed after employment.

### MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:
Completion of associate core coursework in accounting, auditing, finance, business administration or related field;

- Or 18 mos. exp. in accounting, auditing, finance, business administration, or related field, or financial call center work in private sector or other governmental sector;

- Or equivalent of Minimum Class Qualifications For Employment noted above.

### TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:
Not applicable.

### UNUSUAL WORKING CONDITIONS:
May be required to work alternative work schedule to provide customer service; high performance work environment; highly participative workplace.