

Funding

## \*Health Users: Funding Required - Click on Add Funding Entry Below

Funding Start Date

Funding End Date

Chart-Account-Subaccount 3111-13U00-4303801-44-000-0000000000-000000 Currently: blank

Funding FTE% 50 Currently: blank

Funding Start Date

Funding End Date

Chart-Account-Subaccount 3111-12100-4303901-40-000-AR06028201-000000 Currently: blank

Funding FTE% 50 Currently: blank

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## Position Details

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Position Information

Department MED:MIND INSTITUTE (049007)  
UCPath Position # 40258368  
Position Description # 5000487  
Position (Working Title) FINANCIAL OPERATIONS SUPERVISOR  
Current Job Title FINANCIAL ANL SUPV 1  
Current Job Code 004623  
Current Employee Relations Code Supervisor, Not Confidential  
Proposed Job Title/Job Code FINANCIAL ANL SUPV 1 (4623)

Supervisor

**Reports to Name** Michele Y Ono  
**Reports To Job Title** ADMIN MGR 1  
**Reports to UCPath Position #** 40228723

**Position Details****Job Summary**

This position provides expert and comprehensive financial, analytical, and administrative oversight and planning for operating funds, gifts/endowments, grants and contracts. The position also serves as a supervisor to finance and operations assistants and includes management of post-award activities and research core services for the MIND Institute and the IRC. Primary responsibilities include financial analysis, planning and reporting; preparing and reviewing contracts (e.g., purchase agreements, revenue agreements, and service agreements) including budget development; administering and managing grant/contract funds; identifying potential agencies and programs for funding; managing research core recharges; supervision, and working with the School of Medicine Pre-Award unit on research contract and grant proposals submitted by MIND Institute faculty. This position requires an individual who has expertise in financial analysis and planning, managing complex grants, i.e., infrastructure/center awards from federal agencies, in addition to possessing in depth knowledge of university accounting policies, contracts and grant polices, and procedures, strong organizational and analytical skills, attention to detail, good customer service, and experience with supervision.

Currently:

This position provides expert and comprehensive financial, analytical, and administrative oversight and planning for operating funds, gifts/endowments, and grants and contracts. The position also serves as a supervisor to the financial and operations assistants and includes management of pre- and post-award activities and research core services for the MIND Institute and the Imaging Research Center (IRC). Primary responsibilities include financial analysis, planning and reporting; preparing contact and grant proposals, including budget development and grant writing for the administrative sections; administering and managing grant/contract funds including FDA regulated clinical trials; and identifying potential agencies and programs for funding; managing research core finances; and supervision. This position requires an individual who has expertise in financial analysis and planning, managing complex grants, i.e., infrastructure/center awards from federal agencies, in depth knowledge of University accounting policies, contracts and grant polices and procedures, strong organizational and analytical skills, attention to detail, and customer service, and experience with supervision.

**Department Purpose**

The MIND Institute is a research and clinical center whose mission involves awareness, understanding, prevention, and treatment of the challenges associated with neurodevelopmental disabilities. It is a matrix organization and encompasses over 250 faculty and staff from 14 academic departments with an annual operating budget of approximately \$4 million, contract awards totaling approximately \$16 million, and gifts and endowments valued at approximately \$14 million. The MIND Institute also houses 2 sponsored center grants: the Intellectual and Developmental Disabilities Research Center (NIH) and University Center for Excellence in Developmental Disabilities (AUCD), 3 federally sponsored training grants: Autism Research Training Program (NIH), Developmental Behavioral Pediatric Fellowship Program (HRSA), and the Leadership Education in Neurodevelopmental and Related Disabilities (HRSA), and two programmatic infrastructure grants: the Research Network for Creating Partnerships with Diverse and Underrepresented Communities (PCORI) and Redwood SEED Scholars (DoEd).

The Imaging Research Center (IRC) supports human imaging science research and promotes the use of modern imaging methods in basic science and clinical investigations of the brain and body. The IRC supports basic science and clinical research that investigates the structure and function of the nervous system, including perceptual, motor, and cognitive function using real-time functional imaging techniques, and research that investigates systemic physiology and morphology in health and disease. The Center has three MRI scanners two distinct facilities in Sacramento and Davis. The IRC brings in approximately \$1.2M in annual income.

Currently:

The MIND Institute is a research and clinical center whose mission involves awareness, understanding, prevention, and treatment of the challenges associated with neurodevelopmental disabilities. It is a matrix organization and encompasses over 250 faculty and staff from 14 academic departments with an annual operating budget of approximately \$3.6 million, contract awards totaling approximately \$16 million, and gifts and endowments valued at approximately \$14 million. The MIND Institute also houses 2 sponsored center grants: the Intellectual and Developmental Disabilities Research Center (NIH), University Center for Excellence in Developmental Disabilities (AUCD), 3 federally sponsored training grants: Autism Research Training Program (NIH), Developmental Behavioral Pediatric Fellowship Program (HRSA), and the Leadership Education in Neurodevelopmental and Related Disabilities (HRSA), and two programmatic infrastructure grants: the Research Network for Creating Partnerships with Diverse and Underrepresented Communities (PCORI) and Redwood SEED Scholars (DoEd). The Imaging Research Center (IRC) supports human imaging science research and promotes the use of modern imaging methods in basic science and clinical investigations of the brain and body. The IRC supports basic science and clinical research that investigates the structure and function of the nervous system, including perceptual, motor, and cognitive function using real-time functional imaging techniques, and research that investigates systemic physiology and morphology in health and disease. The Center has three MRI scanners two distinct facilities in Sacramento and Davis. The IRC brings in approximately \$1M in annual income.

4 Currently: 2

**Total Number of Staff THIS POSITION Supervises**

**Positions Supervised**

Administrative Assistant 3: 4 FTE  
 Currently:  
 Administrative Assistant 3: 2 FTE

**Essential Responsibilities**

**Percent(%) of Time**

65

**Function**

FINANCIAL MANAGEMENT AND ANALYSIS

**Duties**

- Serve as the account manager for operating funds, gifts/endowments, grants, contracts and recharge rates. Responsible for primary review and authorization of payroll expenses, purchasing, invoicing, travel, entertainment, and honorarium, while ensuring completeness, timeliness and compliance with Center, School of Medicine, and University policies and procedures and agency regulations. Post-award portfolio totals approximately \$25 million in annual expenditures.
  - Prepare monthly financial reports and attend meetings with PIs to present and explain reports, e.g., expenditures, balances, and encumbrances. Monitor and confirm appropriateness of personnel effort, supply, travel, and equipment expenditures on accounts. Reconcile account income and expenses monthly and analyze variances to determine and prepare corrective action as needed (e.g., general error corrections, salary cost transfers). Ensure faculty is alerted to budgetary shortfalls and recommend fiscal resolution and/or realignment of resources. Immediately notify CAO of issues.
  - Provide budget analysis for operating funds, gifts/endowments, grants and contracts. Develop fiscal and budgetary projections for review and make budgetary adjustments as necessary.
  - Work closely with CAO to develop and complete annual budget for operating funds (e.g., 99100, 60103), reserves, and gifts/endowments. Prepare documents for annual budget meeting.
  - Work with departments to ensure their employees' funding distribution is accurate on MIND Institute and Imaging

Research Center accounts. Oversee funding entries are processed timely and accurately. Serve as back-up for submitting funding entries for MIND Institute and IRC employees.

- Fiscally responsible for invoicing and tracking account receivables and payables for operating funds, grants, contracts, recharge rates, and clinical trials. Maintain aging report and follow up with sponsors regarding status of payment. Process grant and subcontract invoices and ensure that all subcontracts stay within budgeted units.
- Manage established research recharge rates. Analyze and process recharges for MIND Institute and Imaging Research Center research core activities, ensuring recharges post to the correct accounts. Reconcile services rendered with research study coordinators of industry, federal and state supported research grants and contracts. Ensure the self-supporting accounts are in compliance with University policies and procedures. Establish new recharge rates by working with CAO, faculty members, and UC Davis Business and Institutional Analysis.
- Responsible for the analysis, review and reconciliation of ledger reports for the operating funds, gifts/endowments, contracts, grants and recharge rates totaling approximately \$30 million, ensuring compliance with University requirements.
- Create accounts, projects/tasks for operating funds, gifts/endowments, contracts, recharge rates, etc.
- Initiate and coordinate the development of business agreements with non-university clients; prepare budget, and work directly with Business Contracts or Procurement in finalizing agreements.
- Independently perform special projects which require researching, collecting data from numerous sources, organizing data into meaningful formats, reviewing appropriateness of data, interpreting data, developing solutions to problems, presenting recommendations for action, and then implementing actions for current or proposed research projects.
- Meet monthly with CAO to review accounts.

Currently:

- Prepare financial monthly reports and attend meetings with PIs to present and explain reports and financial balances. Monitor and confirm appropriateness of personnel effort, supply, travel, and equipment expenditures on accounts. Reconcile account income and expenses monthly and analyze variances to determine and prepare corrective action as needed (i.e., GECs). Ensure faculty is alerted to budgetary shortfalls and recommend fiscal resolution and/or realignment of resources advise on alternate course of action. Immediately notify CAO of problems.
- Provide budget analysis for multiple year grants and contracts. Develop fiscal and budgetary projections for review and make budgetary adjustments as necessary. Prepare faculty and staff payroll expenditure transfers providing sufficient justification and documentation for adjustments.
- Serve as the account manager for operating funds, gifts/endowments, grants, contracts, and recharge rates. Responsible for primary review and authorization of purchasing, invoicing, reimbursement for travel, entertainment and supplies, and honorarium processing, while ensuring completeness, timeliness and compliance with Center, School of Medicine, and University policies and procedures and agency regulations.
- Fiscally responsible for invoicing and tracking account receivables and payables for operating funds, grants, contracts, recharge rates, and clinical trials. Maintain aging report and follow up with sponsors regarding status of payment. Process grant and subcontract invoices and ensure that all subcontracts stay within budgeted units.
- Manage established research recharge rates. Analyze and process recharges for MIND Institute and Imaging Research Center research core activities, ensuring recharges post to the correct accounts. Reconcile services rendered with research study coordinators of industry, federal and state supported research grants and contracts. Balance recharge accounts and prepare financial reports for the CAO to review. Ensure the self-supporting accounts are in compliance with University

policies and procedures. Establish new recharge rates by working with CAO, faculty members, and UC Davis Business and Institutional Analysis.

- Responsible for the analysis, review and reconciliation of ledger reports for the contracts, grants and recharge rates totaling approximately \$30 million, ensuring compliance with University requirements.
- Independently perform special projects which require researching, collecting data from numerous sources, organizing data into meaningful formats, reviewing appropriateness of data, interpreting data, developing solutions to problems, presenting recommendations for action, and then implementing actions for current or proposed research projects.
- Meet monthly with CAO to review research related accounts.

5 Currently: 10

#### Percent(%) of Time

Function POST-AWARD GRANTS MANAGEMENT Currently: PRE-AWARD AND POST-AWARD GRANTS MANAGEMENT

#### Duties

- Advise, consult, and collaborate with faculty members to obtain intramural and extramural funding, including clinical trials. Ensure adherence to Center/Department, University, and agency policies. Serve as a resource for faculty members and a liaison between the University's research administration offices, funding agencies (e.g., federal, state, foundation), and principal investigators (PIs).
- Verify notice of grant awards and correct appropriation of funds. Prepare documents to adjust budgets, as necessary. Maintain control over the flow of all contracts and grants administration, requiring knowledge of different rules and regulations pertaining to expenditures and transfers for a variety of granting agencies. Work with the PIs and research personnel (including other UC Davis departments charging to our grants) in answering questions regarding expenditures on grants and ensure the expenditures are in compliance.
- Prepare, organize and submit progress reports in timely fashion, obtaining required approvals from the PI, Center Director/Department Chair, Sponsored Programs, and the Office of Research. Remind faculty members of submission dates for noncompetitive and competitive renewals of grants.
- Help prepare and review human and/or animal subjects IRB/IACUC protocols for completeness prior to signature of the Center Director.
- Interpret and implement University policies and procedures regarding business and fiscal transactions. Make recommendations regarding expenditures, carry forwards and all other financial details for grants and contracts. Create budgetary adjustments as needed. Observe all fiscal deadlines defined by the University and/or agencies.
- Develop and maintain operational policies and procedures to ensure compliance and sound audit trails for expenditures are implemented in accordance with University and agency requirements. Review equipment purchases for verification of funding and propriety under terms of contracts and grants.
- Implement closing procedures for grants ensuring the timeliness of various campus deadlines and preparing necessary expenditure transfers, payroll transfers and transfer of funds to reconcile accounts.
- Manage effort reporting requirements. Serve as the Effort Reporting System (ERS) Coordinator. Communicate with any other departments involved in the applicable project to ensure that they have the necessary OP fund and account information. Utilize applicable reports to determine whether a PI is overcommitted and/or the data is correct. Meet with the PI on a one-to-one basis (via phone or in person) and assist them with their annual ERS certification to meet University deadlines. Ensure that all faculty and research staff understand and meet federal effort reporting requirements. Ensure NIH cap levels are adhered to and committed cost sharing is reported.

- Collaborate with School of Medicine Pre-Award Unit on research contract and grant proposals submitted by MIND Institute faculty.

Currently:

- Advise, consult, and collaborate with faculty members to develop and obtain intramural and extramural funding, including clinical trials. Ensure adherence to Center/Department, University, and agency policies. Serve as a resource for faculty members and a liaison between the University's research administration offices, funding agencies (e.g., federal, state, foundation), and principal investigators (PIs).
- Initiate, prepare and process high quality applications for competitive grants and contracts, non-competitive renewals, and annual progress reports in timely fashion, obtaining required approvals from the PI, Center Director/Department Chair, Sponsored Programs, and the Office of Research. Remind faculty members of submission dates for noncompetitive and competitive renewals of grants. Track submission of applications through the SOM Dean's Office and the Office of Research to ensure receipt by the agency's deadline.
- Prepare budget, budget justifications, forms, and documents for a variety of granting agencies, ensuring the inclusion of all necessary forms and materials in the grant proposal package and adherence to agency guidelines. Review budget proposals prior to obtaining Director/Chair approval. Prepare timelines and follow up with PI, co-investigators, graduate students, postdoctoral fellows, and research staff to ensure a timely submission of the grant.
- Verify notice of grant awards and correct appropriation of funds. Prepare documents to adjust budgets, as necessary. Maintain control over the flow of all contracts and grants administration, requiring knowledge of different rules and regulations pertaining to expenditures and transfers for a variety of granting agencies. Work with the PIs and research personnel (including other UC Davis departments charging to our grants) in answering questions regarding expenditures on grants.
- Coordinate activities in interdisciplinary projects involving campus departments and investigators, other UC campus personnel, and outside academic and research institutions.
- Initiate and coordinate the development of business agreements with non-university clients; prepare budget, and work directly with Business Contracts or Office of Research in finalizing agreements. Track research subcontracts from multiple institutions to assure that invoices are received in a timely manner and correspond with the stipulations of the agreement.
- Help prepare and review human and/or animal subjects IRB/IACUC protocols for completeness prior to signature of the Center Director. Serve as the contact person with IRB/IACUC to expedite the process. Work closely with the Center's Research Compliance and Quality Manager to ensure the completeness and accuracy of the protocol.
- Facilitate junior faculty development in grant writing and preparation and keep faculty members informed of appropriate grant RFPs. Collaborate with the faculty's home department as needed.
- Represent the Center by attending local, federal, and private foundation meetings to secure project funding.
- Manage all aspects of the grant and contract awards for the Center's faculty members. Process all grant and contract awards in a timely fashion, and obtain required approvals from PI, Center Director, Sponsored Programs, and the Office of Research to initiate project. Serve as the account manager. Post-award portfolio totals approximately \$525 million in annual expenditures.
- Establish new accounts and sub-accounts in DaFIS in accordance with the Department, School of Medicine, University and agency guidelines, and inactivate them at the conclusion of the award or contract.
- Provide budget and fiscal management for extramural and intramural research funds, including clinical trials. Prepare all required internal forms (e.g., UBT) to initiate award. Utilizing DaFIS Decision Support and UC Path, review operating and payroll costs and reconcile actual account expenditures in accordance with budgeted projections. Advise, consult, and collaborate with Center faculty members to project research grant and contract expenditures. Manage and plan PIs, faculty members, and staff direct charges to awards.
- Interpret and implement University policies and procedures regarding business and fiscal transactions. Make recommendations regarding expenditures, carry forwards and all other financial details for assigned accounts; and

encumber pending charges using Quali Financial System transactions. Create budgetary adjustments as needed. Observe all fiscal deadlines defined by the University and/or agencies.

- Develop and maintain operational policies and procedures to ensure compliance and sound audit trails for expenditures are implemented in accordance with University and granting agency requirements. Review equipment purchases for verification of funding and propriety under terms of contracts and grants.
- Implement closing procedures for grants ensuring the timeliness of various campus deadlines and preparing necessary expenditure transfers, payroll transfers and transfer of funds to reconcile accounts.
- Manage effort reporting requirements. Serve as the Effort Reporting System (ERS) Coordinator. Communicate with any other departments involved in the applicable project to ensure that they have the necessary OP fund and account information. Utilize applicable Decision Support reports monthly to determine whether a PI is overcommitted and/or the data is correct. Meet with the PI on a one-to-one basis (via phone or in person) and assist them with their annual ERS certification to meet University deadlines. Ensure that all faculty and research staff understand and meet federal effort reporting requirements. Ensure NIH cap levels are adhered to and committed cost sharing is reported.

**Percent(%) of Time**

5

**Function**

STRATEGIC PLANNING

**Duties**

- Perform short- and long-range planning and analysis for research grant portfolio, including programs on and off site, personnel, space, and financial resources in conjunction with the CAO and Director to meet the research, clinical and educational goals of the MIND Institute and the Imaging Research Center.
- Make recommendation on research and finance topics for strategic growth.

Currently:

- Perform short and long range planning and analysis for research grant portfolio, including programs on and off site, personnel, space, and financial resources in conjunction with the CAO and Directors to meet the research goals of the MIND Institute, Imaging Research Center and Behavioral Health Center of Excellence.
- Make recommendation on research and finance topics for strategic growth.

**Percent(%) of Time**

20 Currently: 15

**Function**

SUPERVISION

**Duties**

- Provide supervision to the finance, operations, and executive assistants for the MIND Institute and Imaging Research Center.
- Assign work and direct employees to execute duties/tasks using established guidelines, procedures, and policies. Responsible for the quality and quantity of work.
- Ensure direct reports are trained to execute assigned tasks and facilitate professional development.
- Complete annual reviews, manage performance including corrective actions, and ensure compliance with annual trainings and health clearance.

Currently:

- Provide supervision to the assigned finance and operations assistants for the MIND Institute and Imaging Research Center.
- Assign work and direct employees to execute duties/tasks using established guidelines, procedures, and policies. Responsible for the quality and quantity of work.
- Ensure direct reports are trained to execute assigned tasks and facilitate professional development.
- Complete annual reviews, manage performance including corrective actions, and ensure compliance with annual trainings and health clearance.
- Provide training to other MIND Institute and Imaging Research Center staff as appropriate.

**Percent(%) of Time**

5

**Function**

OTHER DUTIES AND SPECIAL PROJECTS

**Duties**

- Provide training to other MIND Institute and Imaging Research Center staff as appropriate.
- Participate in administrative staff meetings and complete required training modules, annual reviews, and health clearance (e.g., TB) by specified due dates.
- Assist in MIND Institute and Imaging Research Center events when requested.
- Complete special projects requested by the Directors and Chief Administrative Officer.

Currently:

- Serve as back-up to the Administrative Officer 3 and Financial Assistant 3 when requested.
- Participate in administrative staff meetings and complete required training modules, annual reviews and health clearance (e.g., TB) by specified due dates.
- Assist in MIND Institute, Imaging Research Center, and Behavioral Health Center of Excellence events when requested.
- Complete special projects requested by the Directors and Chief Administrative Officer.

**Qualifications**

**Required Licenses and Certifications**

**Minimum Qualifications**

All job qualifications must be job related and link directly to the duties and responsibilities of the job. The qualifications will determine the applicant pool, should be unbiased, and based on the essential responsibilities of the position.

**Additional Minimum License/Certification**

**Minimum Education/Experience**

Currently:

- Experience supervising employees and managing performance.
- Extensive experience in budget preparation, analysis, reconciliation and forecasting with skills to control complex budgets and anticipate potential problems.



- Experience and proficient in using spreadsheet and database applications for financial analysis, fiscal management and financial reports.
- Extensive experience in exercising professional judgement, discretion and tact, maintaining confidentiality, assessing situations, needs and issues, and identifying and developing solutions/strategies within the scope of this position.

**Minimum Knowledge, Skills, and Abilities (KSA)**

Experience supervising employees and managing performance.

Extensive experience in exercising professional judgement, discretion, and tact, maintaining confidentiality, assessing situations, needs and issues, and identifying and developing solutions/strategies within the scope of this position.

Outstanding customer service skills and ability to serve a diverse clientele (e.g., faculty, staff, external agencies). Excellent interpersonal and communication skills, both verbal and written, and ability to understand and appropriately respond to multiple and frequent inquiries, requests and instructions in a courteous, cooperative and professional manner. Tact, diplomacy and flexibility to effectively deal with leadership, faculty, staff, agencies and others. Ability to represent the Department in a professional manner.

Analytical and organizational skills to independently assume responsibility for coordination and completion of complex projects requiring interactions with many individuals in a matrix organizational structure. Ability to work with minimal direction and to take the initiative to follow up on projects. Ability to solve problems quickly and expedite jobs to accommodate research needs, work with changing priorities and demanding workload.

Extensive experience in budget preparation, analysis, reconciliation and forecasting with ability to control complex budgets and anticipate potential problems. Proficient in using spreadsheet and database applications for financial analysis, fiscal management, and financial reports. Ability to analyze financial data and reports in order to draw meaningful conclusions. Possess strong attention to detail.

Demonstrated success with working independently as well as working in a team.

Demonstrated knowledge in federal financial guidelines as stated in Uniform Guidance. In addition, knowledge of state and foundation grant/contract budgeting, financial reporting, and policies regarding use of funds.

Demonstrated knowledge of generally accepted accounting principles and University accounting policies and procedures.

Thorough understanding of research administration guidelines of Federal and non-Federal sponsors supporting research and educational activities in a publicly funded University.

Knowledge of applicable compliance requirements for research administration, i.e., human or animal subjects in research, financial conflict of interest, biosafety, etc.

Proficient with DaFIS Decision Support, Quali Financial Systems, and Microsoft Office Suite. And/or ability to learn new applications related to finance, accounting, and research.

Knowledge of University policies and procedures on personnel and payroll, purchasing, travel, entertainment, transfers of expenses, invoicing and collections highly desirable.

Currently:

- Outstanding customer service skills and ability to serve a diverse clientele (e.g., faculty, staff, external agencies).
- Excellent interpersonal and communication skills, both verbal and written, and ability to understand and appropriately respond to multiple and frequent inquiries, requests and instructions in a courteous, cooperative and professional manner.
- Tact, diplomacy and flexibility to effectively deal with leadership, faculty, staff, agencies and others.
- Analytical and organizational skills to independently assume responsibility for coordination and completion of complex projects requiring interactions with many individuals in a matrix organizational structure.
- Skills to work with minimal direction and to take the initiative to follow up on projects.
- Skills to solve problems quickly and expedite jobs to accommodate research needs, work with changing priorities and demanding workload.
- Skills to analyze financial data and reports in order to draw meaningful conclusions.
- Possess strong attention to detail.
- Demonstrated success with working independently as well as working in a team.
- Demonstrated knowledge in federal financial guidelines as stated in Uniform Guidance.
- Knowledge of state and foundation grant/contract budgeting, financial reporting, and policies regarding use of funds.
- Demonstrated knowledge of generally accepted accounting principles and University accounting policies and procedures.
- Thorough understanding of research administration guidelines of Federal and non-Federal sponsors supporting research and educational activities in a publicly funded University.
- Knowledge of applicable compliance requirements for research administration, i.e., human or animal subjects in research, financial conflict of interest, biosafety, etc.
- Proficient with AggieEnterprise, AggieBudget, DaFIS Decision Support, Quali Financial Systems, and Microsoft Office Suite; ability to learn new applications related to finance, accounting, and research.

#### Preferred Qualifications

Preferred qualifications are desirable, but not required to possess at entry of the job.

#### Additional Preferred License/Certification

- Certified Research Administrator (CRA) and/or Research Administration Certification.

#### Preferred Education/Experience

- Bachelor's degree in Finance, Accounting, Health Administration, Public Administration, Business or related field of study and / or equivalent experience/training.
- Experience working with and/or knowledge of individuals with neurodevelopmental conditions.

Currently:

- Bachelor's degree in Finance, Accounting, Health Administration, Public Administration, Business or related field of study and / or equivalent experience/training.
- Experience working with and/or knowledge of individuals with autism spectrum disorder and other neurodevelopmental conditions.

#### Preferred Knowledge, Skills, and Abilities (KSA)

Currently:

- Knowledge of University policies and procedures on personnel and payroll, purchasing, travel, entertainment, transfers of expenses, invoicing and collections highly desirable.

**Special Conditions of Employment**

**Smoke Free Work Environment**

The Smoke and Tobacco Free Environment policy is intended to provide a healthier, safer, and more productive work and learning environment for the entire UC community. The University of California prohibits smoking and tobacco use at all University owned or leased properties, or facilities operated by UC staff or faculty. Smoking and tobacco use are strictly prohibited in indoor and outdoor spaces, parking lots, residential space, and University vehicles. <https://ucdavispolicy.ellucid.com/documents/view/13597>

**Work Environment**

- Ability to work occasional overtime, including weekends, to meet project deadline.
- May require to travel to other UC Davis locations within the Sacramento campus and Davis campus.

**Outdoor Work Environment**

No

**Background Check for Critical Position**

The University is committed to providing a safe and secure environment for its staff, faculty, students, patients and others in the University community. To support these efforts, a background check is required by [PPSM 21 Selection and Appointments](#) after a candidate has received a conditional offer of employment in a critical position. (View the policy for details). Employment is contingent upon successful completion of background check(s) for critical positions, which includes but is not limited to criminal record history background check.

If any of the following apply, then this position shall be designated as critical and a background check will be required and you select "yes" below. If none of the following apply, then this position is not critical and not eligible for a criminal record history background check; and you will select "no" below.

- UC Davis Health position
- Management and Senior Professional (MSP) position
- Handle cash or cash equivalent
- Extensive authority for committing the financial resources of the University through contracts or agreements
- Direct responsibility for the care, safety and security of people, including children and minors
- Direct access to or responsibility for controlled substances, high risk hazardous chemicals, biological or radioactive/nuclear materials
- Direct access to and/or responsibility for protected, personal, or other restricted or sensitive institutional information (e.g., information on students, faculty, staff, etc.) and IT resources with such restricted or sensitive information
- Responsible for operating commercial vehicles, machinery or toxic systems that could result in accidental death, injury or health problems
- Student Health and Wellness Center position
- Requirement for a professional license, certificate, degree; or requirement of an external entity
- Direct access to and/or responsibility for information affecting national security

**This is a critical position, as defined by UC Davis policy and local procedures, and as such employment is contingent upon successful completion of background check(s), including but not limited to criminal record history background check(s)** Yes

**Cash-Handling Position**

**The duties or functions of this position include the handling of cash (or cash equivalents)** No

**Mandated Reporter under the Child Abuse and Neglect Reporting Act and UC Policy**

Certain positions are designated as mandated reporters under the Child Abuse and Neglect Reporting Act (CANRA) and [UC Davis policy](#). Mandated reporters are required to report child abuse and neglect to specified authorities. (View the policy for details and definitions)

If any of the following apply, then an employee in this position shall be designated as a mandated reporter under CANRA and UC Davis policy and you select "yes" below. If none of the following apply to this position, then select "no" below.

- UC Davis Health position
- Healthcare Professional (UC Davis campus employees)
- Contact with children on a regular basis; or supervises a position in contact with children on a regular basis either on or off campus
- Supervise minor employees
- Athletic coach, including, but not limited to, an assistant coach or a graduate assistant involved in coaching
- Law Enforcement and Public Safety Professionals
- Human Resource employees (including academic personnel staff or other employees) who are charged with handling discrimination complaints
- Day care worker
- High school internship supervisor
- Positions designated as mandated reporters due to their licensure or profession

**This position is designated as a mandated reporter under CANRA and UC Davis policy and employment is contingent on complying with applicable policies, procedures and training requirements** Yes

**Principles of Community**

**Principles of Community**

UC Davis is a diverse community comprised of individuals having many perspectives and identities. We come from a multitude of backgrounds and experiences, with distinct needs and goals. We recognize that to create an inclusive and intellectually vibrant community, we must understand and value both our individual differences and our common ground. The UC Davis Principles of Community is an aspirational statement that embodies this commitment, and reflects the ideals we seek to uphold.

<https://diversity.ucdavis.edu/principles-community>

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**UC Davis Health Additional Expectations**

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**UC Davis Health Affirmative Action Program**

All supervisors and managers are responsible for actively supporting and implementing the Affirmative Action Program by demonstrating efforts to diversify staff in all selection and promotional opportunities; communicating program objectives to staff; establishing and maintaining a bias-free work environment; and providing opportunities for staff to obtain further training and expertise which will enhance the likelihood of upward mobility. Non-supervisory staff are also responsible for demonstrating their commitment to the Affirmative Action Program. A measure of this commitment is gaining knowledge and increasing sensitivity to the program itself and participating in activities which support the total diversity and affirmative action goals of UC Davis Health.

**This position's responsibility to the Affirmative Action Program is**

As part of following the program outlined above, the employee will work cooperatively with colleagues from diverse backgrounds to establish a bias-free work environment for staff, faculty, and trainees.

**Effective Communication**

Effective communication is essential in UC Davis Health environment. Each employee shall develop and foster open lines of communication both within her/his department and throughout UC Davis Health as deemed appropriate and necessary.

**This position's responsibility to promoting effective communication is**

The employee will maintain a courteous, respectful tone when communicating in person, via phone, or in writing with all colleagues and the general public. The ideal candidate will have strong interpersonal, communication, and decision-making skills.

**Safety****This position's responsibilities and obligations with regard to workplace health and safety is**

Must participate in medical monitoring programs, including film badges, cholinesterase tests, bioassay tests, tuberculosis tests, serum tests, etc., Must participate in preventive medical programs, including immunizations, medical surveillance, and physical examinations., Supervisors/Managers: Responsible for preventing accidents, providing required safety training, observing safety standards and general safety requirements, and ensuring their staff complies with relevant health and safety responsibilities and obligations.

**Mandatory Reporting**

All health practitioners have mandatory reporting responsibilities when an adult (or a minor who meets special circumstances as described in UC Davis Health Hospital P&P 1408) presents at UCCHO as an outpatient or inpatient from any source, and If a person presents for treatment of injuries related to domestic violence; or if one has knowledge of or observes a child who one knows or reasonably suspects is the victim of child abuse; or if one has knowledge of, or reasonably suspects that an elder or a dependent adult is the victim of elder/dependent adult abuse. Non-health practitioners, who suspect that an individual is a victim of abuse as outlined above, are required to report their suspicions to a health practitioner. All employees have a mandatory responsibility for knowing and complying with the Code of Conduct standards and the Compliance Program.

**Employee Responsibility for Confidentiality**

Each UC Davis Health employee is responsible for adhering to the following requirements pertaining to confidentiality. California law and University policy prohibit the unauthorized disclosure of any information regarding a patient's medical history, mental or physical condition, or treatment, without the express authorization of the patient or the patient's legal representative. The unauthorized or improper disclosure of confidential work-related information obtained from any source on any work-related matter is a violation of University policy. A breach of confidentiality may result in corrective action up to and including termination from employment Improper or unauthorized disclosure of confidential information includes, but is not limited to, patient medical information, financial information, and personnel data.

**Check Below Expectations if Applies**

Detailed expectations document to be provided for employee's signature.

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## ADA Checklist

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### ADA Checklist

The physical and mental demands describe the type, intensity, frequency, and duration of physical actions or mental capabilities required to perform the job. The physical and mental demands need to be directly tied to the essential responsibilities of the job.

Please check None or the applicable boxes for the mental, physical, lifting, visual, noise, elements exposed to, and equipment used categories below and indicate the frequency for checked boxes.

Analytical and Problem Solving

For questions or further guidance, please contact Disability Management Services: <https://www.hr.ucdavis.edu/departments/elr/dms>

Frequency

- Occasionally - Up to 3 hours/day
- Frequently - 3-6 hours/day
- Constantly - 6-8 hours/day

#### Mental Demands

Analytical and Problem Solving - Constantly, Customer Contact - Occasionally, Detailed Work - Constantly, Math - Frequently, Reading (documents or instruments) - Frequently, Reasoning - Constantly, Verbal Communication - Occasionally, Written Communication - Occasionally, Training - Occasionally

#### Additional Mental Demands

#### Physical Demands

Sitting - Constantly, Speaking - Occasionally, Talk or Hear - Occasionally

#### Lifting Requirements

Up to 10 Pounds (Sedentary) - Occasionally

#### Visual Acuity Requirements

Close Visual Acuity (e.g., viewing a computer screen; using measurement devices) - Constantly

#### Noise Conditions

None

#### Physical Demands (Elements Exposed to)

None

#### Additional Physical Demands

Computer and Peripheral Equipment - Constantly, Surgical Face Mask - Occasionally

**Equipment Used to Perform the Duties**

**Additional Equipment Used to Perform the Duties**

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**Position Documents**

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New Position Description Documents

- 1. Organization Chart
  - MIND Org Chart
- 2. Approvals
  - Workforce Request Signed

Current Position Description Documents

- 1. Organization Chart
    - Organization Chart
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**Decision Details**

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**Decision Details**

|   |                               |
|---|-------------------------------|
| <b>Approved Job Code</b>                        | 004623                        |
| <b>Approved Job Title</b>                       | FINANCIAL ANL SUPV 1          |
| <b>Job Group</b>                                | B08 Admin,Bud,Pers,Acct Lower |
| <b>FLSA Status</b>                              | Exempt                        |
| <b>Union Code (Bargaining Unit)</b>             | 99                            |
| <b>Salary Plan</b>                              | CTDV                          |
| <b>Salary Grade</b>                             | 22                            |
| <b>Classified Indicator (Personnel Program)</b> | Professional & Support Staff  |

4/19/24, 7:50 AM

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|                               |           |
|-------------------------------|-----------|
| <b>Minimum Annual Salary</b>  | 72300.00  |
| <b>Midpoint Annual Salary</b> | 101700.00 |
| <b>Maximum Annual Salary</b>  | 131100.00 |
| <b>Minimum Hourly</b>         | 34.63     |
| <b>Midpoint Hourly</b>        | 48.71     |
| <b>Maximum Hourly</b>         | 62.79     |

**Additional Decision Details**

**Approved Legacy MSP Salary Grade**

**Temporary X-Ref Position**

**CEMRP2 Code (Health Only)** Currently: IPTCS

**HEERA/Union Representation** Currently: This position is not represented by a collective bargaining unit.

**Explanation** Currently:  
Approved 5% increase.

**Job Opening ID#**

**Disposition**

**Action Review By**

**Priority** Currently: Priority 2

**Union Notice**

**Date Union Noticed**

**Date of Union Response**

**Union Decision**

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**Notes**

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**Notes**



4/19/24, 7:50 AM

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**Notes**