

DISTINGUISHING FEATURES OF THE CLASS: This is highly important account keeping work involving responsibility for the frequent exercise of independent judgment in planning and managing complex account keeping, checking, coding and clerical activities and independently performing the more responsible and complex functions. The work is performed under general supervision and in accordance with outlined objectives, policies and detailed procedures. Difficult technical or policy problems are referred to a supervisor for decision or review of judgment and recommendations are made. Supervision may be exercised over the work of assigned clerical or account clerical staff.

TYPICAL WORK ACTIVITIES: *The typical work activities listed below, while providing representative examples of the variety of work assignments in the title, do not describe any individual position. Incumbents in this title may perform some or all of the following, as well as other related activities not described.*

Plans, assigns and reviews the maintaining and checking of a wide variety of financial records and reports and instructs employees in the specialized details of this work;

Revises and develops improved procedures and methods and installs those approved by superiors;

Handles complaints, suggests solutions to problems and conducts correspondence;

Assists superiors in the preparation of budget information, collection of data, compiling of statistics and solution of personnel problems;

Maintains complex activity control records, schedules work loads and flow and coordinates the work with that of other units;

Compiles, prepares and analyzes complex labor, material and operational cost records and reports;

May supervise subordinate clerical/account clerical staff;

Classifies a complex variety of receipts and expenditures and distributes costs records according to a prescribed code;

Compiles, prepares and analyzes a variety of complex financial and statistical records and reports;
Supervises and reviews the checking of complex account-keeping records and reports for arithmetical and clerical accuracy, completeness and proper extension;
Supplies data for budget, recommends budget estimates and assists in maintaining budget control;
Operates computing, calculating, check writing and other office machines;
Performs a variety of standard keyboarding tasks, including typing correspondence, records and reports

FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES, AND PERSONAL CHARAC-

TERISTICS: Extensive knowledge of modern methods used in keeping and checking financial records and reports; thorough knowledge of office terminology, procedures and equipment; thorough knowledge of business English; good knowledge of double entry bookkeeping; ability to prepare accounting and budgetary spreadsheets using a variety of computer programs; ability to plan, assign and supervise the work of account keeping and clerical assistants; ability to understand and carry out complex oral and written directions; ability to make arithmetic computations rapidly and accurately; ability to prepare correspondence and reports; good knowledge of keyboarding practices; ability to secure the cooperation of others; ability to deal effectively with the public; ability to readily acquire familiarity with departmental organization, functions, laws, policies and regulations; good judgment in solving complex account-keeping problems; a high degree of accuracy, initiative and resourcefulness; tact; and courtesy.

MINIMUM QUALIFICATIONS: Either:

- (A) Graduation from a regionally accredited college or university or one accredited by the New York State Board of Regents to grant degrees with a Bachelor's Degree or higher in Business Administration, Accounting or a related field; or
- (B) Graduation from a regionally accredited college or university or one accredited by the New York State Board of Regents to grant degrees with an Associate's Degree in Business Administration, Accounting or a related field and two (2) years of progressively responsible experience in maintaining or checking financial records or reports; or
- (C) Graduation from high school or possession of a high school equivalency diploma and four (4) years of progressively responsible experience as described in (B) above; or
- (D) Five (5) years of progressively responsible experience as described in (B) above.

NOTE: Successful completion of coursework in business administration, accounting or a related field at a college or university, may be substituted for the required experience with three (3) semester credit hours being equivalent to three (3) months of experience for a maximum of twelve (12) semester credit hours.

NOTE: Your degree or credits must have been awarded by a college or university accredited by a regional, national, or specialized agency recognized as an accrediting agency by the U.S. Department of Education/U.S. Secretary of Education. If your degree or credits were awarded by an educational institution outside of the United States and its territories, you must provide independent verification of equivalency. A list of acceptable companies who provide this service can be found on the Internet at: <https://www.cs.ny.gov/jobseeker/degrees.cfm>. You must pay the required evaluation fee.

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Last reviewed: 09/05/2006
Jurisdictional Class: Competitive
Public Hearing: N/A
NYS Civil Service Commission Approval: N/A

Reviewed 04/21/2003
Revised in classplan on 9/5/06
Revised in classplan on 09/08/2014
Replaced in classplan on 09/08/2014
Revised and Replaced in Classplan: 2/28/2023
Revised and Replaced in Classplan: 5/12/2025 (Edu)