

Position Description
Financial Program Supervisor

POSITION SUMMARY

This position will supervise the STAR – Business Partner Services (BPS) Section within the State Controller's Office. This section will provide central support for the enterprise Supplier and Customer data tables within the STAR system.

The State has approximately 40 thousand vendors within its current central vendor file. Beginning in July 2015, the State Controller's Office will centrally support additions/changes to approximately 1,000 vendors each month. This effort will require a considerable amount of communications with state vendors and with agency accounts payable managers.

Additionally, the State has approximately 35 thousand customers within its central customer file. Beginning in July 2015, the State Controller's Office will centrally support additions/changes to approximately 1,250 customers each month. This will require a significant amount of communications between the BPS Section and the agency accounts receivable managers.

This position will manage the maintenance and support for these key areas, according to the policies and procedures that have been established by the State Controller's Office, in conjunction with the STAR project. The position will initially supervise 4 Financial Specialist LTEs. The position must become familiar with the PeopleSoft system in the Supplier/Accounts Payable and Customer/Accounts Receivable areas. Additionally the position must receive training on customer service, and developing performance-service standards.

Time %
65%

Goals and Worker Activities

A. Manage the secure receipt and accurate input of the State's vendor and customer data into the STAR system.

1. Develop policies and procedures for the secure receipt of vendor and customer data. Work with the Division of Enterprise Technology to develop secure channels for receiving vendor and customer data.
2. Maintain input forms for vendors and customers to submit their data to the State Controller's Office.
3. Work with the Financial Specialist(s) to ensure that vendor and customer data are entered timely into PeopleSoft.
4. Contact state vendors and customers when necessary to follow-up on questions about their data.
5. Ensure that vendor and customer data is transmitted securely to the IRS and OFAC, and that any mismatch or compliance issues are addressed in a timely manner.
6. Develop and maintain the state's procedure manual for the entry of vendor and customer data into PeopleSoft.

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7. Provide information and training to state agency financial specialists and accountants.
8. Work with technicians to further improve the MS SharePoint system used to manage vendor/customer updates.

- 25% B. Develop and Maintain a Performance System that continually measures the performance of the BPS Section.
1. Communicate with other states using PeopleSoft to determine best practices for a performance measurement system.
 2. Work with the Division of Enterprise Technology to purchase/build a system that works with MS SharePoint to measure turn-around times and other performance measures by Financial Specialist.
 3. Collect monthly performance metrics, and discuss any performance issues with the Financial Specialists.
 4. Continually work to improve the BPS support process, and the efficiency of stakeholder communications.

- 10% C. Additional Vendor/Customer activities as required.

State of Wisconsin
Office of State Employment Relations
Division of Compensation and Labor Relations

Supervisor Exclusion Analysis

This information is to be provided by the position's supervisor and reviewed by the agency central office human resources representative for both filled and vacant positions and must be submitted as part of any position description (PD) for a position performing supervisory responsibilities (i.e., if # 13 of the PD is checked YES). This information will be used to determine (1) if the position is performing supervisory functions and thus should be allocated to a supervisory classification and (2) what supervisory classification is appropriate based on the total duties of the position.

According to s. 111.81(19), Wis. Stats., a supervisor is any individual "who has authority, in the interest of the employer, to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline employees, or to adjust their grievances, or to authoritatively recommend such actions" and "whose principal work is different from that of the subordinates." The criteria used by the Wisconsin Employment Relations Commission (WERC) to apply this definition include: the authority to effectively recommend the hiring, promotion, transfer, discipline or discharge of employees; the authority to direct and assign the workforce; the number of employees supervised (typically a minimum of 3 FTE permanent employees); the amount of time spent supervising; the number of other persons exercising greater, similar or lesser degrees of authority over the same employees; the level of pay, including an evaluation of whether the supervisor is paid for skill or supervision of employees; whether the supervisor is primarily supervising an activity or is primarily supervising employees performing the activity; whether the supervisor is a working supervisor or whether he/she spends a substantial majority of his/her time supervising employees; and the amount of independent judgment and discretion exercised in the supervision of employees. The WERC ultimately determines the appropriateness of supervisory exclusions.

Position Identification Data

- 1. Name of Employee (if filled): _____
- 2. Civil Service Classification: Financial Program Supervisor
- 3. Department and Division: Administration - Executive Budget and Finance
- 4. Bureau, Section and Unit (or comparable): State Controller's Office - Business Partner Services
- 5. Name and Classification of Supervisor: Jeff Anderson, Financial Manager
- 6. Name and Complete Civil Service Title of Former Incumbent (if any): Joel Schuster, Accountant - Senior

7. Supervisory Responsibilities

a. In view of the definition statement and criteria listed in the second paragraph of this form, does the incumbent of this position:

- (1) have the responsibility for directly supervising the activities of other classified employees? YES NO
- (2) have the responsibility for supervising the activities of lower level supervisors? YES NO
- (3) meet the definition statement and criteria? YES NO

b. List the official classification titles and number of permanent classified employees (full or part-time) directly supervised by the incumbent. If this position supervises lower level supervisors, indicate the number of employees supervised by the lower level position(s) in parentheses after the classification title of the position. (NOTE: LTE, student, patient/inmate, volunteer, and unclassified employees should be specifically identified since the direction of these individuals is not considered to warrant supervisory status.)

Financial Specialist 5 (1), Info Systems Operations Support Tech Entry (1), Financial Specialist 2 - LTE (3)

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c. What percentage of this position's total time is allocated to each of the following?

- | | |
|--|-------|
| 1) Supervisory functions (i.e. hiring, dismissing, disciplining employees, evaluating performance, settling grievances)? | 10% |
| 2) Activities relating to supervisory responsibilities (i.e., establishing operating procedures, reviewing work of subordinates, counseling subordinates on performance, training and orienting new employees, performing related administrative functions, etc.)? | 80% |
| 3) Performance of other work activities <u>similar</u> to those of the employees supervised? | 10% |
| 4) Performance of other non-supervisory work activities <u>different</u> from those of the employees supervised (including program administration)? | 0% |
| *NOTE: The totals of c.1), 2), 3), and 4) must equal 100%. | 100% |
| | *100% |

8. Organizational Relationships

List (in order of descending authority) the names and classification titles of all other positions in the employing unit in the chain of command over the employees listed in 7.b.

Karen Anderson - Info Systems Operations Support Tech Entry

 Debra Granger - Financial Specialist 5

A copy of the organizational chart must be attached for the immediate work unit (i.e., the organizational unit which includes the employees supervised), including the names and classifications of all employees.

9. Supervisory Activities

Is this position identified as a formal step in the employee grievance procedure? YES NO
(If no, list below the name and classification of the first formal step in the grievance procedures for the employees listed in 7.b.)

A signature below means the position has been reviewed and you have concluded it meets the definition of supervisor found in s. 111.81 (19), Wis. Stats.

Supervisor Jeff Anderson Date 4/24/2015

Human Resources Representative _____ Date _____

To be completed by Incumbent (for filled positions):

- I agree with the preceding statements.
- I do not feel that the preceding statements are accurate for the reasons indicated below.
- No Comment _____

Employee Signature _____ Date _____

OSER-DCLR-84 (Rev. 02/2013)
Section 230.09 Wis. Stats

