

Date completed/ revised: DD/MM/YYYY

Position Details

Title	Accounting Clerk
Reports To	Insert title, not individual's name
Department	Finance
Position Status	<input type="checkbox"/> Employee <input type="checkbox"/> Contractor <input type="checkbox"/> Consultant <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> On-going <input type="checkbox"/> Term Term End Date (if applicable): DD/MM/YYYY
Eligible for Benefits	<input type="checkbox"/> Yes <input type="checkbox"/> No Comments if applicable
Overtime Exemption Status	<input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt
Variable Compensation	<input type="checkbox"/> Bonus <input type="checkbox"/> Commission <input type="checkbox"/> Shift Premium <input type="checkbox"/> Car Allowance <input type="checkbox"/> Not applicable
Hours per Week	Insert actual expected hours of work per week, excluding breaks or lunch/week
Location	
Job Classification	CUSTOMIZER: If classifications have been established, insert job categories. Below shows an example. Otherwise, delete this row <input type="checkbox"/> Clerical <input type="checkbox"/> Administrator <input type="checkbox"/> Coordinator <input type="checkbox"/> Manager <input type="checkbox"/> Director <input type="checkbox"/> VP
Salary Range	Insert salary range, or insert: "As per Job Classification"
Direct Reports	As of DD/MM/YYYY but subject to change, position is responsible for Insert number direct reports, as follows: ♦ Title. Insert additional bullets as required <input type="checkbox"/> Not Applicable

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Set up your HR Department

A complete HR Toolkit for small business to create and maintain your HR fundamentals.

Create your HR materials

- 260+ premium templates to create contracts, employee manuals, forms, spreadsheets and manager guides
- Download your HR folders
- Identify your HR priorities
- 22 HR topics
- Create HR intranet

Support your HR Function

- COVID-19 Portal
- Legislation Portal
- Remote Workforce Portal
- Mental Health Portal
- Diversity & Inclusion Portal
- Weekly updates, email notifications
- Help & support. With real humans!



Create HR for Clients

HR Toolkit for Small Business, but made for HR consultants with the following differences:

- Special licensing for use with clients
- Additional module + additional download of pre-assembled folders and templates to create your own master HR toolkit to re-use for new clients
- Pricing.

- d. Assists in preparing checks, deposits, budgets, and financial reports.
- e. Records information, processes and files forms.
- f. Updates ledgers.
- g. Investigates and resolves discrepancies.
- h. Assists in month-end reporting procedures.
- i. Tracks and audits petty cash.
- j. Compiles data - including for budgets and reports.
- k. Banking.
- l. Liaises with auditors to provide documentation required.
- m. Reconciles general ledger accounts including bank and credit cards.
- n. Processes re-occurring payments including taxes, and monthly benefits statements.
- o. Maintains orderly financial filing system.

2. General Support Example 20%

- a. Performs basic office tasks, including reception and phone relief, responding to emails and processing mail.
- b. Files and completes general administrative tasks such as word processing, filing, faxing and photocopying.
- c. Liaises with other departments and stakeholders.

3. Insert high-level responsibility Example 20%

- a. List key tasks associated with that responsibility
- b.
- c.
- d.

Job-Related Technical Skills

Skills	Proficient	Experience with	Familiar with
Accurate Data entry	x		
Bookkeeping		x	
MS Office products, particularly Excel.	x		
Accounting software, preferably QuickBooks		x	

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ATTENTION TO DETAILS

- ◆ Thoroughly accomplishes tasks with the utmost attention placed on accuracy in all areas involved, no matter how small.
- ◆ Monitors and double checks information to produce consistently error-free work.
- ◆ Adheres to procedures and standards.
- ◆ Possesses a strong ability to focus on tasks and priorities amidst continuous distractions.

PROBLEM SOLVING

- ◆ Assesses challenges to identify causes.
- ◆ Gathers and processes relevant information.
- ◆ Generates creative solutions and finds a way to make it work.
- ◆ Makes recommendations and/or resolves the situation.
- ◆ Acknowledges when one doesn't know something and takes steps to find the answer.

ANALYTICAL

- ◆ Examines and interprets a wide variety of data/information and makes recommendations or decisions.
- ◆ Identifies underlying complex issues.
- ◆ Systematically compares and organizes.
- ◆ Personally investigates and digs deeper to understand new concepts, approaches, and cause-and-effect.

TEAMWORK / COLLABORATION

- ◆ Works cooperatively and effectively with others to set goals, resolve problems, and make decisions.
- ◆ Promotes collaboration and interaction.
- ◆ Works effectively with people with different abilities and perspectives.
- ◆ Resolves conflict quickly and lets it go.
- ◆ Shares information.
- ◆ Supports team members.
- ◆ Makes time for celebration.

DRIVE FOR RESULTS / TENACITY / BIAS FOR ACTION

- ◆ Strives for results and focuses on reaching goals.
- ◆ Overcomes obstacles, pressure, difficult situations, and conflicting priorities.

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Acknowledgement

Accepted and agreed to by:

EMPLOYEE

Employee Name	
Signature	Date

MANAGER APPROVAL

Manager Name	Manager Title
Signature	Date

NEXT LEVEL APPROVAL

All job descriptions require approval by **CUSTOMIZER: Insert approval position level 1. Example: Department VP, or delete this section if not applicable.**

Name	Title
Signature	Date

HR APPROVAL

All positions require review and approval by **HR CUSTOMIZER: Insert HR approval level. Example: HR Manager, or delete this section if not applicable.**

Name	Title
Signature	Date