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| **STATE OF SOUTH DAKOTA****Career Banding Questionnaire**Accounting |
|  **EMPLOYEE SECTION** |
| 1. **Personal Data**
 |
| *Name:* | *Position Number:*  | *OR Employee Number:* |
|        |        |       |
| *Class Title:* | *Working Title:* |
|       |       |
| *Department:* | *Division/Program:* |
|       |       |
| 1. **Purpose**

The purpose of a job is the primary reason why the job exists.  |
| *What is the purpose of your position?* |
| * +
 |
| 1. **Accountabilities**

Accountabilities are the major areas of responsibility in your job.  |
| 1. Group your job tasks into the following Accountabilities and complete an accountability section (beginning on the next page) for each area that you perform:
* **Fiscal Procedures**
* **Reconciliation of Records**
* **Report & Budget Preparation**
* **Technical Assistance**
* **Policies, Procedures & Legislative/Rule-Making Processes**
* **Audit & Project Completion**
* **Personal Management**
1. If you do not perform tasks under an Accountability listed above, do not complete it and delete the page.
2. If there are additional tasks that you perform that do not fit under any of the Accountabilities, add your own accountability (under the *Other Accountability* section), and specify the tasks performed.
3. If you need to add more accountability sections than what is provided, follow these steps:

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| **Microsoft Word 2010** |
| 1. Unprotect the document (*Developer → Restrict Editing*).
2. Choose *Stop Protection*.
3. Copy a current *Other Accountability* section and paste it on an additional page.
4. Protect the document (*Developer* *→ Restrict Editing*, choose *Yes, Start Enforcing Protection,* choose *OK*.).
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| 1. **Accountability: FISCAL PROCEDURES**

*E.g., Verifying availability of funds, processing contract requests and orders, review and approval of purchase requests, processing of accounts payable, calculating payment amounts, issuing checks, maintaining the accounting system (journalizing, posting, balancing).*  | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
| *
 |
| *Describe the most challenging and complex aspects:* |
| *
 |
| *Decisions you make:* |
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 |
| *Decisions you refer to your supervisor:* |
| *
 |
| *List the people (internal or external) you frequently deal with related to this accountability and the nature of the relationships:* |
| *
 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
| *
 |
| *Describe the type of financial transactions (journalizing, posting, balancing, etc.) that have been assigned to you to record:*  |
| *
 |
| *Describe your responsibilities, if any, pertaining to coordinating work with colleagues to provide accurate and meaningful financial information:*  |
| *
 |
| *Describe the nature of general ledger accounts that you review, analyze, and/or correct:*  |
| *
 |
| *Describe the complexity and degree of your involvement in the financial facets of agency programs (e.g., activities related to issuance of debt, complex cash flow forecasting, and complex cost allocation):* |
| *
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| 1. **Accountability: RECONCILIATION OF RECORDS**
 | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
| *
 |
| *Describe the most challenging and complex aspects:* |
| *
 |
| *Decisions you make:* |
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 |
| *Decisions you refer to your supervisor:* |
| *
 |
| *List the people (internal or external) you frequently deal with related to this accountability and the nature of the relationships:* |
| *
 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
| *
 |
| *Describe the nature of the most complex records that you have been assigned to prepare and maintain:*  |
| *
 |
| *Describe the nature of the records’ risk and exposure, in terms of the resources impacted, that have been assigned to you:* |
| *
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| 1. **Accountability: ACCOUNTING AND FINANCIAL REPORTING**
 | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
| *
 |
| *Describe the most challenging and complex aspects:* |
| *
 |
| *Decisions you make:* |
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 |
| *Decisions you refer to your supervisor:* |
| *
 |
| *List the people (internal or external) you frequently deal with related to this accountability and the nature of the relationships:* |
| *
 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
| *
 |
| *Describe the nature and complexity of the financial management reports that you have prepared:*  |
| *
 |
| *Describe the nature of the oversight and assistance provided to you by senior level colleagues regarding report preparation:*  |
| *
 |
| *Describe your responsibilities, if any, pertaining to the presentation and explanation of financial/audit reports and/or accounting issues to senior level accountants:* |
| *
 |
| *Describe your involvement, if applicable, in budget preparation and/or analysis of budget data:* |
| *
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| 1. **Accountability: TECHNICAL ASSISTANCE**

*E.g., providing expertise to others (colleagues, management, or external parties); training others; assigning, directing, and reviewing work the work of others, providing guidance in highly complex or sensitive projects and issues).* | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
| *
 |
| *Describe the most challenging and complex aspects:* |
| *
 |
| *Decisions you make:* |
| *
 |
| *Decisions you refer to your supervisor:* |
| *
 |
| *List the names and titles of those you provide technical assistance to, and the nature of the technical assistance:* |
| *
 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
| *
 |
| *If you serve as a technical/project lead or an expert, please describe the nature and level of your expertise (i.e., relative to others in the department):* |
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| *Describe the effect of your recommendations and the complexity of the accounting issues that have been assigned to you for research and analysis:* |
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| 1. **Accountability: POLICIES, PROCEDURES & LEGISLATIVE/RULEMAKING**

 **PROCESSES** | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
| *
 |
| *Describe the most challenging and complex aspects:* |
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 |
| *Decisions you make:* |
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 |
| *Decisions you refer to your supervisor:* |
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 |
| *List the people (internal or external) you frequently deal with related to this accountability and the nature of the relationships:* |
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 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
| *
 |
| *Describe the scope and complexity of the policies and procedures that you have been assigned to develop or analyze:* |
| *
 |
| *Describe the nature and complexity of your involvement in the development of accounting systems/possesses:* |
| *
 |
| *Describe your degree of involvement in the analysis of state and federal regulations and development of related financial policies and procedures:* |
| *
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| 1. **Accountability: AUDIT & PROJECT COMPLETION**
 | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
| *
 |
| *Describe the most challenging and complex aspects:* |
| *
 |
| *Decisions you make:* |
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 |
| *Decisions you refer to your supervisor:* |
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 |
| *List the people (internal or external) you frequently deal with related to this accountability and the nature of the relationships:* |
| *
 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
| *
 |
| *Describe the most complex audits and/or projects that you have been assigned and completed independently:* |
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| *Describe the nature of the oversight and assistance you received from senior level auditors and managers regarding the completion of audits and/or projects:* |
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| 1. **Accountability: PERSONNEL MANAGEMENT**

*E.g., Selection; compensation; performance management; discipline; planning and assigning work; planning training and development; and conflict management.* | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
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 |
| *Describe the most challenging and complex aspects:*  |
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 |
| *Decisions you make:* |
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| *Decisions you refer to your supervisor:* |
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 |
| *List names and titles of staff who report to you (if any):* |
| *
 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
| *
 |
| *If you perform supervisory tasks for employees you do not formally supervise, list their names and titles, and describe the type of supervision you provide:* |
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| *Describe your involvement, if any, in project administration (e.g., establishing plans, identifying resource needs, assigning tasks to junior colleagues):* |
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| 1. **OTHER Accountability:**
 | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
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 |
| *Describe the most challenging and complex aspects:*  |
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 |
| *Decisions you make:* |
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 |
| *Decisions you refer to your supervisor:* |
| *
 |
| *List names and titles of staff who report to you (if any):* |
| *
 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
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| **9. OTHER Accountability:**  | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
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 |
| *Describe the most challenging and complex aspects:*  |
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 |
| *Decisions you make:* |
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 |
| *Decisions you refer to your supervisor:* |
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 |
| *List the people (internal or external) you frequently deal with related to this accountability and the nature of the relationships:* |
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 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
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| 1. **OTHER Accountability:**
 | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
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 |
| *Describe the most challenging and complex aspects:*  |
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 |
| *Decisions you make:* |
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 |
| *Decisions you refer to your supervisor:* |
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 |
| *List the people (internal or external) you frequently deal with related to this accountability and the nature of the relationships:* |
| *
 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
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| --- | --- |
| 1. **OTHER Accountability:**
 | **% of time:** |
| *Briefly summarize your responsibilities related to this accountability:* *
 |       |
| *Specific tasks within area of accountability:* |
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 |
| *Describe the most challenging and complex aspects:*  |
| *
 |
| *Decisions you make:* |
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 |
| *Decisions you refer to your supervisor:* |
| *
 |
| *List the people (internal or external) you frequently deal with related to this accountability and the nature of the relationships:* |
| *
 |
| *Describe how your job has changed in nature and/or complexity (e.g., new or changed duties, increased responsibilities, etc.) related to this accountability:* |
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| 1. **Knowledge Requirements for the Position**
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| *What knowledge, skills, education (including professional licenses or certificates), and experience are required at entry for this position?*  |
| *Knowledge:*       |
| *Skills:*       |
| *Education (including Licenses or certificates):*       |
| *Experience:*        |
| *What knowledge, skills, education (including professional licenses or certificates), and experience are required of a fully trained and competent employee in this position?* |
| *Knowledge:*       |
| *Skills:*       |
| *Education (including Licenses or certificates):*       |
| *Experience:*       |
| 1. **Your Education & Experience**
 |
| *Describe your education (list all post-secondary education; if degree obtained list major; if no degree, list major or coursework, and number of years or semester hours).* |
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| *List any professional licenses or certificates you hold.* |
| *
 |
| *List all of the accounting-related jobs you have held (list title, employer, brief summary of duties, and number of years job was held).* |
| *
 |
| *Describe areas of knowledge or skill you have that contribute to successful job performance.* |
| *
 |
| *List any training you have received that contributes to successful job performance.* |
| *
 |
| 1. **Changes**
 |
| *If applicable, describe how your job has changed over the past two years.* |
| *
 |
| *If applicable, describe any changes you anticipate will occur in your job in the next two years.* |
| *
 |
| 1. **Comments**
 |
| *Describe any comments you feel may be relevant in describing your current position.* |
| *
 |
| **Employee Signature:**       | **Date:**      |