

BUDGET TECHNICIAN

DEFINITION

A Budget Technician performs complex clerical and computational duties and operates a computer terminal utilizing Business Tools for Schools (BTS), in processing budget adjustment requests, preparing budget reports, and participating in studies and researching budgetary matters.

TYPICAL DUTIES

- Assists in the preparation of materials used for the District and school site budget, budget control, publications, reports for the Board of Education, and research studies.
- Operates a computer terminal utilizing BTS in processing budget transactions for Central and Local District offices and schools.
- Downloads and distributes Business Warehouse (BW) reports to schools and administrators.
- Assists in the preparation of various budgetary reports for the County Superintendent of Schools.
- Drafts vouchers for submission to the County Superintendent of Schools to reflect adjustments between major classes of expenditures as approved by the Board of Education.
- Researches, reviews for completeness and accuracy, and processes position adjustments requests to authorize changes, additions, or deletions of positions.
- Drafts and processes appropriation adjustments that authorize the Accounting and Disbursements Division to adjust appropriations.
- Prepares correspondence and spreadsheets in response to inquiries.
- Confers with a Senior Budget Technician, Supervising Budget Technician, or fiscal staff regarding the procedures to be used in researching budgetary matters.
- Prepares working papers for obtaining data on new budgetary studies and research.
- Maintains budget records, control sheets, and files.
- Assists in the preparation of information related to questionnaires and forms from outside agencies that solicit information regarding the District.
- Assists fiscal staff by tracking and filing documents and corresponding with schools and other offices during budget development and budget maintenance.
- May perform basic reconciliations of Local District accounts, such as Imprest Funds and P-Cards.
- May process and maintain files of purchase orders for central or Local District offices.
- May assist fiscal staff with the scheduling and confirming of trainings of Local District and School based staff.
- May provide training on budgetary procedures.
- Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Budget Technician performs difficult clerical and computational duties and operates a computer utilizing BTS in processing budget requests, preparing budget reports, and participating in studies and research relating to budgetary matters.

A Senior Budget Technician supervises and participates in the work of a small group of Budget Technicians performing detailed clerical and computational duties involved in budget development and maintenance.

An Accounting Technician II performs clerical accounting work involving posting, verifying, checking, and/or calculating data; prepares statements, reports, and trial balances; checks accounting documents; classifies expenditures or receipts as to accounts; prepares disbursement vouchers; and may substitute for higher-level accounting clerical personnel.

SUPERVISION

General supervision is received from a Senior Budget Technician, Supervising Budget Technician or fiscal staff. No supervision is exercised.

CLASS QUALIFICATIONS

Knowledge of:

Office practices and clerical procedures regarding working with numerical data
General budgetary provisions of and budgetary terms contained in the Education Code, California School Accounting Manual and its supplements, and Board Rules
Human Resources Division and Personnel Commission regulations affecting fiscal and budgetary matters
Budgetary practices and procedures used in the District
District organizational units and functions
Microsoft Windows Operating Systems
Applications such as Microsoft Word, Excel, Access, and PowerPoint

Ability to:

Read and understand complex regulations
Develop statistical information and analyze it as directed
Prepare statistical tables and reports
Operate calculating machines in a variety of difficult computations
Operate a computer terminal
Organize and perform tasks accurately under the pressure of deadlines
Handle and perform multiple tasks

ENTRANCE QUALIFICATIONS

Education:

Graduation from high school or evidence of equivalent educational proficiency, preferably including or supplemented by courses in general office practices, office machines, bookkeeping, accounting, and data processing.

Experience:

Three years of clerical experience with duties that involved making arithmetical computations and preparing budgetary and other statistical reports.

The class description is not a complete statement of essential functions, responsibilities, or requirements. Entrance requirements are representative of the minimum level of knowledge, skill, and /or abilities. To the extent permitted by law, management retains the discretion to add or change typical duties of a position at any time, as long as such addition or change is reasonably related to existing duties.