Position Description Form (PDF)

College: Sir Sandford Fleming

Incumbent's Name:

Position Title: Research Financial Assistant (OARI)   Payband: F

Position Code/Number (if applicable):

Scheduled No. of Hours: __35_____ per week

Appointment Type: X 12 months   □ Less than 12 months (please specify # months: _____)

Supervisor's Name and Title: Mary Lou McLean, Manager, Office of Applied Research & Innovation

Completed by: Mary Lou McLean   Date: September 30, 2021
                                                   Updated: n/a

Signatures:

Incumbent: Date:
(Indicates the incumbent has read and understood the PDF)

Supervisor: Date:

Dated:

Instructions for Completing the PDF

1. Read the form carefully before completing any of the sections.

2. Answer each section as completely as you can based on the typical activities or requirements of the position and not on exceptional or rare requirements.

3. If you have any questions, refer to the document entitled "A Guide on How to Write Support Staff Position Description Forms" or contact your Human Resources representation for clarification.

4. Ensure the PDF is legible.

5. Responses should be **straightforward and concise using simple factual statements.**

Position Summary

Provide a concise description of the overall purpose of the position.

Reporting to the Manager, Office of Applied Research & Innovation (OARI), this position plays a pivotal role in supporting the financial operations of the OARI, and works closely with the Research Grants Financial Officer in supporting the financial administration of all research grants at the college, including to but not limited to the Centre for Advancement of Water & Wastewater Technologies (CAWT), the Centre for Innovative Aquaculture Production (CIAP) and the Centre for Advancement in Mechatronics & Industrial Internet of Things (CAMIIT).

This role is responsible for supporting procurement for large infrastructure projects and all asset management tracking for OARI, including the preparation, submission and tracking of low dollar value RSFQs. As well, this position is responsible for tracking all assets of the research division.

This position will also be for coordinating the day to day financial and payroll transactions of the research office, in accordance with various deadlines, including invoices for payment through Visa, cash expenses and purchase requisitions as well as payroll contracts, timesheets for a variable number of administrators, faculty researchers, research technologists/technicians and students.

Dated:

Duties and Responsibilities

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

	Approximate % of time annually*
Accounts Payable/Visa/Expense • Tracks and processes all visa and cash expenses for research staff • Orders/Cancels/Changes credit cards • Collates invoices with visa statements and reviews for accuracy • Reconciles credit card statements for applicable staff • Creates and requests invoices for cash contributions and fee for service contracts through Finance; and	40%
HR/Payroll Transactions • Assists with the processing and flow of all payroll transactions of the OARI in accordance with various deadlines, including payroll timesheets, grant timesheets, standard workload forms, requests for faculty release, exception reports, overtime forms. • Scans, copies or distributes all necessary paperwork for auditing records to shared drive or to internal departments (finance, human resources) as requested as well as to external funders as required.	35%

Dated:

Purchasing Support • Key contact for all purchasing for the research centres at the college • Ensures adherence to the college's Purchasing Policy and the Ministry's Expense Directive • Prepares low dollar value RSFQs in accordance with the process set out by Purchasing • Acts as main contact for applicable Requests for Quotes • Obtains quotes for budgets at the proposal stage • Tracks all quotes received and communicates with bidders as appropriate • Enters requisitions and tracks delivery and receipt, requests supplier data forms from new vendors and acts as primary liaison with applicable vendors • Drafts Non-Competition requests for management review • Seeks guidance from Purchasing department when required • Coordinates and receives specifications from technical staff for drafting final specifications	10%
Research Capital Tracking • Supports capital intensive grants (e.g, CFI) by preparing equipment lists, supporting researchers preparing equipment specs, supporting cost estimates, and tracking vendor discounts • Tracks and tags all grant-funded research equipment of the college into a central inventory system • Monitors Infrastructure Operating Fund (IOF) for all CFI equipment	10%
Other related duties as assigned	5%

* To help you estimate approximate percentages:

½ hour a day is 7%	1 hour a day is 14%	1 hour a week is 3%
½ day a week is 10%	½ day a month is 2%	1 day a month is 4%
1 week a year is 2%		

Dated:

1. Education

A. Check the box that best describes the **minimum** level of **formal** education that is required for the position and specify the field(s) of study.   Do not include on-the-job training in this information.

□ Up to High School	□ 1 year certificate	x 2 year diploma
□ Trade certification	□ 3 year diploma / degree	□ 4 year degree or 3 year diploma / degree plus professional certification

□ Post graduate degree (e.g. Masters) or 4 years degree plus professional certification

□ Doctoral degree

Field(s) of Study:

Accounting and/or Business Administration

B. Check the box that best describes the requirement for specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirement that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

x   No additional requirements

□   Additional requirements obtained by course(s) of a total of 100 hours or less

□   Additional requirements obtained by course(s) of a total between 101 and 520 hours

□   Additional requirements obtained by course(s) of a total of more than 520 hours

2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

5

Check the box that best captures the typical number of year of experience, in addition to the necessary education level, required to perform the responsibilities of the position and, in the space provided, describe the type of experience. Include any experience that is part of a certification process, but only if the work experience or on-the-job training occurs after the conclusion of the educational course or program.

□ Less than one (1) year

□ Minimum of one (1) year

□ Minimum of two (2) years

X Minimum of three (3) years

- o Experience processing financial transactions and associated administrate tasks, including the use of spreadsheets (Excel)
- o Proficiency in a variety of software including but not limited to Excel, Word, Outlook, Internet browsing applications, Webex , Zoom and Microsoft Teams
- o Experience interpreting various federal and provincial research funding guidelines is preferred
- o Experience with formal public sector procurement process and BPS legislation and asset tracking
- o Specifications and technical writing ability
- o Experience with international travel, currency & customs
- o Excellent organizational skills.
- o Must be able to maintain confidentiality and demonstrate tact and diplomacy at all times
- o Must have strong communication and interpersonal skills and be able to function professionally and efficiently in stressful situations
- o Demonstrated ability to prioritize tasks, proactively analyze and anticipate issues, effectively solve problems in a timely manner and exercise sound judgment.
- o Effective team player (with multiple teams) with a commitment to quality improvement processes.
- o Ability to work with significant autonomy.
- o Ability to multi-task.
- o Ability to work in a high-pressure environment with constantly changing priorities
- o Strong attention to detail
- o Training in Broader Public Sector Procurement

Dated:

Minimum of five (5) years

□ Minimum of eight (8) years

Dated:

3. Analysis and Problem Solving

This section relates to the application of analysis and judgement within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgement required to do so.

Please provide up to three (3) examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

#1 regular & recurring

Key issue or problem encountered.	Each month the incumbent must review the daily hours for the month for approximately 35 employees in different researcher areas who are part of different employee groups and on different contracts to ensure each hour is allocated to the correct grant. This is a complex process as there are many active grants and the hours must both match what is on their contract as well as the budget remaining in the grant for salaries.
How is it identified?	Incumbent receives the recorded time in a form of timesheet (not a payroll timesheet) that itemizes each day of the month and the hours allocated to specific projects (grants).
Is further investigation required to define the situation and/or problem? If so, describe.	Yes. Often information is either incorrect or missing from the recorded time, such as an inactive department, the incorrect number of hours compared to the employee contract, or not enough description as to the duties that were performed.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent must verify the weekly hours recorded against the employee's contract as well as verify that the department the hours are allocated to has remaining budget for the hours recorded. If there is missing or inadequate information, the incumbent must follow up with the employee and/or the employee's Manager.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	Employee contracts Project budgets Department listing

3. Analysis and Problem Solving

#2 regular & recurring

Dated:

Key issue or problem encountered	Each month the incumbent is responsible for collecting and reviewing the visa statements for approximately 10 staff members. Often information is incorrect, receipts are missing, or not enough detail is provided in the explanation for the expense.
How is it identified?	Incumbent reviews the expense recorded against the invoice that was provided.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes - Once the problem is clarified the incumbent must determine what steps and sequence should be taken to resolve the issue and may ask further questions or look up information to assist.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent must have a good understanding of the general ledger accounts and departments of the research centres. If improper accounts or departments are used, there could be a negative impact on the financial statements and the departments and could result in a loss of funding if recorded in an unfunded department. Therefore, the incumbent is to have an in-depth knowledge of all active research grants. To solve the situation, the incumbent would verify the invoice with the employee (or vendor) and follow up with the Research Grants Financial Officer to ensure there is adequate budget for the expenses. Where information is missing, the incumbent would follow up with the employee.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	Purchasing policy Visa guidelines Grant guidelines Budget documents

#3 regular & recurring

Key issue or problem encountered	An employee submitted an expense form for travel, meals and mileage costs but did not provide proof of pre-authorization for the travel which is a requirement of NSERC funding.
How is it identified?	While reviewing the expense statement, there was no pre-authorize travel form provided.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes – the incumbent must determine if the employee simply forgot to provide the pre-authorization form or if the employee did not obtain pre-authorization for the expenses.

Dated:

Explain the analysis used to determine a solution(s) for the situation and/or problem.	If the employee forgot to provide the pre-authorization form, the incumbent would attach it to the expense form. If the employee did not get authorization for the travel, the incumbent would speak to the employee's manager to determine how to resolve.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	Travel Authorization Tracking form Purchasing Policy Provincial Directive on spending

3.   Analysis and Problem Solving

#1 occasional

Key issue or problem encountered	Employee claims mileage that exceeds the threshold for travel claims and that should have been a car rental.
How is it identified?	The incumbent receives an expense statement for review that includes a mileage expense that exceeds the threshold allowed by the college travel policy.
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent would ask for rationale from the employee as to why a car wasn't rented and whether they had approval from their manager to claim mileage.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	If this had not been approved, the incumbent would let the manager know that this would need to be approve by Finance. The expense statement would need to be amended to provide the justification for the mileage claim.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	Fleming's expense directive NSERC funding guidelines

#2 occasional

Dated:

Key issue or problem encountered	
How is it identified?	
Is further investigation required to define the situation and/or problem? If so, describe.	
Explain the analysis used to determine a solution(s) for the situation and/or problem.	
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	

4. Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

Using the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

#1 regular & recurring

List the project and the role of the incumbent in this activity.	Research asset tracking. The incumbent is responsible for recording, tagging and tracking all grant-funded research capital at the college into a database (Excel or college system). This includes tagging all new equipment that is purchased through an established coding system, recording the details of the purchase, including name of funder, warranty expiry information, location, purchase price, vendor and contact information. The list is updated on an ongoing basis with new purchases, and each year the incumbent meets with the research leads to discuss turnover. As well the incumbent is the keeper of all purchase records in case there is an issue with a piece of equipment.

Dated:

What are the organizational and/or project management skills needed to bring together and integrate this activity?	Incumbent should have an eye for detail as well as good planning and organizational skills. Written and verbal communication skills: Communicating to researchers, lab staff, suppliers and Purchasing. Collaboration skills: Works with Manager, OARI and Purchasing department to track equipment.
List the types of resources required to complete this task, project or activity.	Asset management policy Grant proposals Quotes and Invoices Supplier websites
How is/are deadline(s) determined?	Deadlines are determined by the Manager
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	The incumbent, in consultation with the researcher managers would make these determinations.

4. Planning/Coordinating

#2 regular & recurring

Dated:

List the project and the role of the incumbent in this activity.	Incumbent is responsible for coordinating the completion, authorization and timely submission of all research Timesheets, Visa statements and expense claims that are completed by employees of the OARI and all dedicated research centres at the college.
	Unlike other departments at the college, all employees in the OARI and research centres have and use both corporate and purchasing college credit cards on a regular basis. Some employees have had their spending maximum on their credit card increased from the regular $5,000 per month to $15,000 per month due to the volume of purchases they are required to make. In addition to the credit card purchases, Fleming research staff do a much larger volume of travel than other departments, which translates to a much greater volume of expense claims. As well, many of the researchers work at different locations than the incumbent.
	The OARI has a tighter deadline than all other departments at the college, as all OARI expenses are reviewed by Finance prior to submission.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	The incumbent needs exceptional organization and planning skills as well as diplomacy and tact. For example, each employee completes and submits monthly research timesheets, however depending on whether the employee is part-time or full-time, dictates when they are due to Payroll.
	Coordinating and organizing this level of paperwork (expense claims, travel authorization forms, timesheets, visa statements) every month and sometimes more often with several layers of review and authorization takes excellent planning skills. As well, these items are often not a priority to complete for the employees or a priority for the manager to authorize, so the incumbent is required to use great diplomacy and tact in order to ensure they are all complete and authorized by the deadlines.
List the types of resources required to complete this task, project or activity.	Calendars, tracking spreadsheets, Fleming website Payroll, Finance
How is/are deadline(s) determined?	There are two deadlines: one imposed by other college departments and an internal OARI deadline that is set based on the college deadlines.

Dated:

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	Other college departments would determine if changes to the deadlines are required, for example the Payroll department may change the regular payroll cycle deadlines to a compressed cycle due to holidays.

#3 regular & recurring

List the project and the role of the incumbent in this activity.	Coordinating and tracking all accounts receivable for the OARI specifically, the payment of invoices by industry partners for cash contributions to projects and fee for service contracts undertaken by the research centres. This includes issuing and sending invoices to partners, tracking payment and following up on delinquent accounts.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Incumbent must have a system in place for tracking payments and reconciling accounts on a monthly basis.
List the types of resources required to complete this task, project or activity.	Collaborative Project Outlines signed by partners, funding guidelines, OARI procedures and college financial procedures
How is/are deadline(s) determined?	Deadlines are set by the details in the collaborative project agreements which are determined by the researcher and the Manager, OARI
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	Manager, OARI

4. Planning/Coordinating

#1 occasional

Dated:

List the project and the role of the incumbent in this activity.	Canada Foundation for Innovation (CFI) grant submission valued at $2M for research infrastructure and equipment. The incumbent is responsible for supporting the researchers in preparing a list of instrumentation and equipment that will be submitted with the proposal, tracking quotations received as well as vendor discounts that will be part of the proposal submission. In addition, the incumbent is responsible for tracking construction and renovation costs and change orders associated with the project. The incumbent keeps a master list of quotes as they come and keeps a running tally of the overall value to ensure the value of the equipment does not exceed the threshold for the grant. If the grant is awarded, the incumbent is responsible for post-award tracking of purchases and liaising with Purchasing and Finance to reconcile the grant account.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Due to the compressed timeline for submitting CFI grants, incumbent must have strong organizational and project management skills to keep the team updated as quotes come in from vendors. The equipment list changes on an almost hourly basis and the incumbent must ensure that they have the most recent versions of quotes, prices and discounts updated immediately.
List the types of resources required to complete this task, project or activity.	CFI guidelines, Purchasing guidelines, Excel templates.
How is/are deadline(s) determined?	Deadline for submitting the grant is set by CFI, however internal deadlines for quotes is set in consultation with the incumbent's manager and other supporting departments (Purchasing and Finance)
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	This would be determined by the VP, Applied Research & Innovation and the Manager, OARI.

#2 occasional

List the project and the role of the incumbent in this activity.	
What are the organizational and/or project management skills needed to bring together and integrate this activity?	
List the types of resources required to complete this task, project or activity.	

15

Dated:

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

Dated:

5. Guiding/Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g. other employees, students). Focus on the actions taken (rather than the communication skills) that directly assist others in the performance of their work or skill development.

Though Support Staff cannot formally "supervise" others, there may be a requirement to guide others using the incumbent's job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks.

Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

Regular & Recurring	Occasional	Level	Example
X	☐	Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	Incumbent advises all research employees and student employees regarding policy interpretation related to expense claims, travel forms, timesheets and visa statements,
X	☐	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks.	Incumbent advises researchers on proper procedure for obtaining quotes for purchases and in general advises staff on Purchasing procedures and guidelines
☐	☐	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities	
☐	☐	The incumbent is an active participant and has ongoing involvement in the progress of others with whom they have the responsibility to demonstrate correct processes/procedures or provide direction.	
☐	☐	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

Dated:

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in the position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?	
Regular and Recurring	~~Occasional (if none, please strike out this section)~~
Job duties are performed in accordance with general instructions and guidelines. The incumbent is aware of the day-to-day responsibilities of the position in relation to the funding cycles and internal college deadlines. Special projects are outlined generally by the Vice-President, Applied Research and Innovation. The incumbent has autonomy to make day to day decisions and most assignments are completed with no supervision. Independent judgment and thinking is required throughout the span of an assignment.	

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	~~Occasional (if none, please strike out this section)~~
College policies & procedures OARI Office procedures and "how to" documentation Funding policies and guidelines Expense Directives Purchasing guidelines Budget principles and accounting procedures	

How is work reviewed or verified (eg. Feedback from others, work processes, Supervisor)?	
Regular and Recurring	Occasional (if none, please strike out this section)

Dated:

Much of the work of the incumbent is performed in collaboration with the Research Grants Financial Officer who has a high level understanding of the day to day financial operations of OARI. Work is reviewed by exception and/or discussion of processes. On occasion or in unusual situations, the incumbent may refer to Vice-President or Manager for clarification.	

6. Independence of Action

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor?	
Regular and Recurring	Occasional (if none, please strike out this section)
Department priorities with Vice-President. External agencies/suppliers – Travel bookings, logistics/confirmations. External suppliers - Cost estimates, ordering supplies, return policies. External stakeholders – Industry partners regarding invoicing. Purchasing – procurement of equipment Finance – expense procedures and guidelines	If unsure of an internal process to be followed, the incumbent would check with the appropriate department guidelines before proceeding

Describe the type of decisions that would be decided in consultation with the Supervisor.	
Regular and Recurring	Occasional (if none, please strike out this section)
Staff and Human Resources issues requiring signature and/or approval of the Vice-President. Facilities and maintenance re. space utilization/needs Conflicts and/or sensitive issues requiring unscheduled and immediate administrative resolution.	Major deadline/workload conflicts.

Describe the type of decisions that would be decided by the incumbent.

Dated:

Regular and Recurring	~~Occasional (if none, please strike out this section)~~
The incumbent develops and/or modifies new office processes to meet the needs of the department and staff as needs change. (ex. Timesheet deadlines, internal expense process, etc.) Setting up and managing appropriate tracking systems. Developing documentation for new processes and changing existing processes to meet needs of new guidelines and technology. Assesses and prioritizes own workload and decides on best method for handling in order to meet expected deadlines. Decides how best to support special projects to accomplish the objectives defined by the Vice-President.	

Dated:

7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which the position delivers service to customers. It is not intended to examine the incumbent's interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfil the service requirement. A "customer" is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency (D, W, M. I)*
How is it received?	How is it carried out?		
Employees send financial documents (timesheets, expense forms, visa statements, procurement quotes) to incumbent based on a pre-determined schedule	Incumbent reviews documents on a daily basis follows up with employees if more information is needed. For non-routine questions, the incumbent will forward to the appropriate Manager.	Research employees	D
Incumbent receives payment for invoices by industry partner based on a payment schedule set out in the Collaborative Project Outline	Incumbent follows up with industry partner to confirm receipt or to discuss delinquent account	Industry partners	M
Incumbent works with vendors on the procurement of equipment	Based on requests from researchers, incumbent sources vendors to acquire and order equipment	External vendors	M

*   D = Daily   W = Weekly   M = Monthly   I = Infrequently

8. Communication

Dated:

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g. exchanging information, formal presentations) and written (e.g. initiate memos, reports, proposals) in the section(s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D, W, M ,I)*
Exchanging routine information, extending common courtesy	Day to day interactions with Research Grants Financial Officer include face to face verbal communication, email & phone. All interactions relate to day to day financial transactions in the OARI as well as monthly reporting to various college departments (Payroll, Accounting Operations)	Research Grants Financial Officer	D
	Day to day interactions with VP, Applied Research & Innovation and Manager, OARI, face to face, email & phone. All interactions relate to calendaring, budgets and planning.	VP, AR & Manager, OARI	D
	Day to day interactions with team at CAWT, CIAP, CAMIIT & OARI related to deadlines for expenses, timesheets and procurement rules.	Staff	D
Explanation and interpretation of information or ideas	Explaining Purchasing guidelines to team at CAWT, CIAP, CAMIIT & OARI; explaining expense directives/procedures	Staff	D
Imparting technical information and advice			
Instructing or training			
Obtaining cooperation or consent			

Dated:

Negotiating			

* D = Daily W = Weekly M = Monthly I = Infrequently
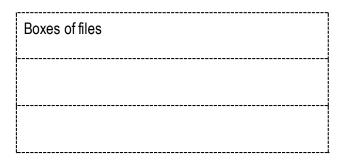
9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period.

Physical Activity	Frequency (D, W, M, I)*	Duration			Ability to reduce strain		
		< 1 hr at a time	1 - 2 hrs at a time	> 2 hrs at a time	Yes	No	N/A
Sitting	D		X		X		
Carrying boxes of files	I	X			X		

* D = Daily W = Weekly M = Monthly I = Infrequently

If lifting is required, please indicate the weights below and provide examples.

X Light (up to 5 kg or 11 lbs)

□ Medium (between 5 to 20 kg or 11 to 44 lbs)

□ Heavy (over 20 kg or 44 lbs)

Boxes of files

Dated:

10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:

- the audio/visual effort and the focus or concentration needed to perform a task and the duration of the task, including breaks (eg. up to 2 hours at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (eg. multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Tracking of all financial transactions (expense statements, invoices, etc.)	D		X	
Can concentration or focus be maintained throughout the duration of the activity? If not, why? x Usually				

Activity #2	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Asset tracking	M			X
Can concentration or focus be maintained throughout the duration of the activity? If not, why? x Usually				

Activity #3	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Coordinating the multiple steps involved when handling and distributing copies of financial documents (due to audit requirements)	D		X	
Can concentration or focus be maintained throughout the duration of the activity? If not, why? x Usually				

*   D = Daily   W = Weekly   M = Monthly   I = Infrequently

Dated:

11. Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

Working Conditions	Examples	Frequency (D, W, M, I)*
x acceptable working conditions (minimal exposure to the conditions listed below)		D
□ accessing crawl spaces/confined spaces		
□ dealing with abusive people		
□ dealing with abusive people who pose a threat of physical harm		
□ difficult weather conditions		
□ exposure to extreme weather conditions		
□ exposure to very high or low temperatures (e.g. freezers)		
□ handling hazardous substances		
□ smelly, dirty or noisy environment		
□ travel		
□ working in isolated or crowded situations		
□ other (explain)		

*   D = Daily   M = Monthly   W = Weekly   I = Infrequently

25

Dated: