



JOB DESCRIPTION

FINANCE SECRETARY

May 2026

Position Type:	Support
Job Title:	Secretary to Principal/Finance Secretary
Report to:	Building Principal
Department:	Clerical
Pay Scale:	Hourly per Negotiated Agreement
Contract days:	242 Days
Job Number:	615

POSITION SUMMARY

The Finance Secretary at a school site primarily schedules appointments, gives information to callers, takes dictation, and otherwise relieves officials of clerical work and minor administrative and business detail.

QUALIFICATIONS/JOB REQUIREMENTS

- High School Diploma or Equivalent
- Knowledge of School Finance
- Knowledge of Microsoft Word, Excel, and Google Suite
- Knowledge of district budgeting procedures
- Communication Skills
- Knowledge of OCAS coding

DUTIES AND RESPONSIBILITIES

- Assist and relieve principal of paper work and impediments
- Schedules and receives principal's appointments, phone calls, routes mail, bulletins, documents, etc.
- Maintains all staff records; attendance, certification, request for activities, purchasing, accident reports, transportation request, as necessitated
- Prepares State Accreditation Report and Quarterly Data Reports
- Set up schedules for substitute teachers; class assigned, payroll reporting, etc.
- Set up building General Fund Budget distribution within building and maintain balances, set up Activity Fund Accounts and guide teachers with correct auditing procedures. Assist building principal with Grant Budgets and guidelines within OCAS codes
- Receipts, deposits all monies, and post deposits
- Inputs all purchase orders, receives and checks in all orders, routes to appropriate departments
- Operates various office machines, and maintenance that pertains to such
- Covers front office, as needed
- Maintains record keeping by ensuring previous school records have been received for new students and sending records out to other districts requesting within 3 business days per state guidelines.
- May help with discipline by entering discipline logs or updating attendance, as needed
- Responsible for running report card audits for teachers to approve before final grades are stored.
- Assist custodial staff with supply orders, work orders, and general needs
- Other tasks as assigned, requested by Principal and staff

ADDITIONAL JOB FUNCTIONS

- Attend staff meetings and serve on committees as required
- Maintain knowledge of software and equipment used to perform duties, such as, word processing, database, spreadsheets, e-mail, and office equipment.
- Know, understand and follow applicable safety policies and procedures, including but not limited to: proper lifting techniques, awareness of eye strain, use of proper wrist support when keyboarding for extended periods of time and office ergonomics.

WORKING CONDITIONS

- Office environment
- Occasional travel to and from other district sites
- Must be able to sit or stand for prolonged periods
- Must be able to perform light physical work, occasionally lifting up to 30 pounds without assistance in an indoor setting
- Must be able to move throughout the building and from building to building
- Must be able to reach in all directions and bend/stoop to store and retrieve files, use telephone, calculator, computer and other office equipment
- Must be able to operate a computer and other office productivity machinery, such as a copy machine and computer printer
- Must be able to converse with administrators, staff, parents, and the public, and must be able to exchange accurate information with such individuals
- Must be able to review written materials in print and electronic formats
- Must be able to complete job duties in an environment with background noise and frequent interruptions

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