



Example of Records Specialist Job Description

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Our innovative and growing company is looking for a records specialist. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for records specialist

- Utilize and update imaging capture software and repository
- Perform in-depth searches involving complex search criteria (i.e., large geographic areas or various depths and formations.)
- Identify data not received in a timely fashion and work with asset team members to ensure delivery
- Assist the Accounting Supervisor I with the processing of gifts-in-kind, payroll deductions, Convio (Cancer Institute), Direct Line (Alumni Dues), and Ruffalo Cody (Annual Fund) transactions as needed
- Create analytical reports to help upper management identify trends in online giving other key performance indicators (KPI's)
- Process and maintain recurring gifts by credit card using Cybersource
- Process gifts made by cash, check and over-the-counter credit cards pledges, dues, and receipting transactions as needed
- Assist the Development Records Specialist with manual credit card processes adhering to procedures for handling and maintaining confidential credit card information
- Assist in yearly support pack testing the testing of enhancement and new system functionality
- Research and resolve donor questions

Qualifications for records specialist

- College degree preferred, High School diploma or GED equivalent required

- Able to keep up in a fast-paced work environment
- Review and submit requests for matching gifts and process matching gift payments
- Maintain appropriate back-up documentation for all gifts and pledges based on record retention policy standards