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Expense Management Coordinator

Position Overview

The Expense Management Coordinator is responsible for reviewing and approving expense reports submitted to our financial system (Certinia). In addition, this role will provide general support to the finance team, helping to cover various accounting duties due to outages, limited bandwidth, or other reasons. This role requires strong analytical skills and a high attention to detail. Excellent verbal and written communication are essential skills in this role.

The Expense Management Coordinator actively contributes to our culture of belonging, where everyone feels welcome and supported. In addition, this person embraces Evergreen's goal of being the *"Best Place to Work"* through building relationships, working collaboratively, and embodying our company's values (Care Personally, Extend Grace, Be Responsive, Take Ownership, Be Transparent, Innovate).

The Expense Management Coordinator role is hourly, non-exempt. This role is a member of the Finance Team and reports to the Project Accounting Manager. Work can be done either in-person in our Middleton, WI office, hybrid or remote.

Essential Functions

Expense Coordination

- Promptly review and approve expense reports, ensuring submitted reimbursements meet travel policies and are applied consistently.
- Review, verify, and approve timesheets, expenses, and invoices for work that is related to a specific project and verify against third party systems.
- Coordinate with project accountants to ensure timely and accurate reimbursement and pay adjustments related to time and expense submissions.
- Assist with time and expense reimbursement inquiries or issues.
- Provide primary end-user support to Evergreen's consultant and Home Office Team members for our time and expense management system (Salesforce).
- Maintain internal and client documentation for expense reporting policies.
- Assist with VMS (Vendor Management System) time and expense submissions and reconciliations, ensuring accuracy for invoicing and consultant payments and reimbursement.

Project Record Management

- Assist with management of project records within the professional services automation (PSA) system, including auditing, and closing projects.
- Update project records with specific purchase order, contracts, and/or statement of work details or records once received from the client.
- Prepare, review, and analyze project record reporting and submit weekly and monthly general reports.
- Update, and audit client and contact information in the PSA system.
- Investigate and resolve account discrepancies by working with our sales

Hiring organization

Evergreen Healthcare Partners

Job Location

6720 Frank Lloyd Wright Ave, Suite
200, 53562, Middleton, WI, USA
Remote work possible

and recruiting teams to obtain additional details.

General Accounting

- Manage corporate travel programs including airlines, car rentals, etc.
- Assist with corporate credit card and expense reconciliation activities, following up with employees as needed when corrective action is required.
- Sort and organize incoming mail based on priority, or recipient, and ensure timely delivery to the intended recipients.

General:

- Uphold Evergreen's mission (Create authentic partnerships that improve healthcare) and values (Care Personally, Extend Grace, Be Responsive, Take Ownership, Be Transparent, Innovate).
- Cultivate meaningful relationships across Evergreen.
- Embrace radical candor by developing relationships across Evergreen and providing direct feedback and recognition at all levels.
- Communicate in meetings, one-on-ones, and daily interactions with clarity, purpose, and respect for the individuals involved in the discussion.
- Participate in cross-functional projects.
- Coordinate and support company-wide programs and special projects.
- Assist and back up other colleagues when necessary.
- Embrace change as Evergreen scales systems and processes.
- Attend Evergreen's in-person annual retreat one time per year.

Qualifications

- One or more years of project accounting experience.
- Strong knowledge and experience using Microsoft 365 products: Word, Excel, PowerPoint, Teams, and Outlook, along with experience using Salesforce, Certinia, and other relevant software applications.
- Excellent interpersonal skills with the ability to manage sensitive and confidential information with professionalism and diplomacy.
- Ability to establish and maintain effective working relationships with diverse groups of team members, managers, and vendors.
- Demonstrated commitment to put forth consistent effort and successfully complete assigned tasks quickly without sacrificing quality.
- High attention to detail, including strong time management, analytical, organizational, and active listening skills.
- Ability to communicate directly in a concise manner to individuals and groups while contributing to a positive working environment.
- Experience coordinating and executing organizational processes.

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

Salary Range

\$ 42,500 - \$ 58,500 , depending on experience, in addition to bonus eligibility and a comprehensive benefits package. This role is hourly, non-exempt.

Work Hours + Travel Requirements

Evergreen's core working hours are 9am – 5pm Central Time, and most of our internal meetings take place during this window. Flexible schedule available in

consultation with management.

Physical Demands

Prolonged periods sitting at a desk and working on a computer. Must be able to lift up to 15 pounds at a time.

Work Authorization Requirements

Evergreen is interested in every qualified candidate who is eligible to work in the United States. However, we are currently unable to sponsor work visas. At this time, candidates must reside in the U.S. to be eligible to work at Evergreen Healthcare Partners.