



**GIG**  
CYMRU  
**NHS**  
WALES

Bwrdd Iechyd Prifysgol  
Betsi Cadwaladr  
University Health Board

**CAJE REF: 2022/0050**

## **JOB DESCRIPTION**

### **JOB DETAILS:**

<b>Job Title</b>	Finance Officer (Contracts)
<b>Pay Band</b>	4
<b>Hours of Work and Nature of Contract</b>	Full Time 37.5 hours per week
<b>Division/Directorate</b>	Finance
<b>Department</b>	Healthcare Contracting Department
<b>Base</b>	Mold

### **ORGANISATIONAL ARRANGEMENTS:**

<b>Managerially Accountable to:</b>	Senior Finance Manager (Contracts)
<b>Reports to: Name Line Manager</b>	Senior Finance Manager (Contracts)
<b>Professionally Responsible to:</b>	Head of Healthcare Contracting – Finance

### **JOB SUMMARY / PURPOSE**

The post holder will undertake analytical reviews of contract information and will control the NCA invoicing processes covering all non BCU Health Board patients treated by the Health Board, or all BCU patients treated outside of the catchment area by other Welsh Health Boards, English Foundation Trusts or other non-Welsh Healthcare Providers.

Responsible for ensuring that all contracting information (financial and non-financial) is managed and processed in accordance with Statutory and Legal accounting principles and policies and timescales, through completion of own work and through coordination of the work of others.

Investigating, analysing and reporting of any aspect of contract or commissioning data, and providing assistance, advice and support to managers as may be required in relation to any aspect of contracting or commissioning, including ad hoc insourcing and outsourcing initiatives.

Supporting all aspects of the contracting, commissioning and healthcare providing services, including Specialist and Non-Specialist services provided both within and outside of the Health Board.

May be required to discuss financial matters with patients, particularly in respect of Individual Patient Funding Requests (IPFR) or Overseas Visitors in relation to any charging or funding.

### **MAIN DUTIES AND RESPONSIBILITIES**

1. To assist with the monitoring of all healthcare contract activity and income / expenditure supporting the production of Health Boards monthly performance management reports
2. To produce and develop monthly contract monitoring (price and activity) for all relevant Health Care Contracts to enable the production of Income & Expenditure reports (actual and year end projections).
3. To monitor, investigate and analyse, any aspect of contract / non-contract income and expenditure within the financial ledger, providing advice and assistance to managers as required.
4. To assist in the reconciliation of monthly activity to the information dataset produced by the Information Department, and the pricing of these datasets for any cost per case contracts.
5. To undertake checking and validation of all commissioning and non-contracted activity, raising queries with trusts and Health Boards with agrees timescales and operating procedures, securing amendments and credit notes as appropriate.
6. To assist with the monitoring and control of Specialist Services contracts and activity, through the validation and analysis of financial and activity performance data.
7. To analyse the information datasets to produce the information to invoice for non contract NCA activity, to arrange for invoices/ credit notes to be raised.
8. To provide monthly contract monitoring support, advice and analysis for all Corporate income and expenditure Service Level Agreements.
9. To provide costing support for service developments and other changes to the contracting base.
10. Assist in implementing measures to maximise Contract and Non Contract income through analysis of information datasets and assisting the setting up of sustainable data collection within the HB to capture income.

11. To deal with all queries relating to Provider Contract and Non Contract activity, and to assist in the recovery of overdue invoices.
12. To be aware of, and keep up to date with, all relevant legislation and guidance that applies to Contracting and NCA invoicing, particularly in the area of cross border flows and the National Payments By Results (PBr) guidelines and rules.
13. To provide any support required to the Commissioning Team, and the management and follow-up of monthly contract meetings with providers and commissioners.
14. Any other duties commensurate with the grade as required.
15. Follows Health Board policies, adheres to SFI's. Comments and implements local procedures e.g. IPFR, NCA invoicing.

### **COMMUNICATION AND RELATIONSHIPS**

- The post holder is required to develop and maintain positive working relationships within Finance and Information, and also with operational staff in the LHB. These communications can involve the sharing and explaining of financial and activity information, and projections from this such as predicted out-turn on elements of Contracts. The post holder will also be required to maintain positive working relationships with Finance, Planning and Information staff from external bodies such as Welsh LHBs, English NHS bodies

### **ANALYTICAL SKILLS AND JUDGEMENT**

- The post holder is required to prepare detailed and accurate financial and activity projections on Contracts, and NCA activity, using a variety of data sources and tariff structures.
- The post holder will be required to undertake complex calculations and analysis, particularly involving PbR calculations.

### **PLANNING AND ORGANISATION**

- The post holder is required to organise information flows, and plan their workload, in order to meet strict time-tables for invoicing and making adjustments to the ledger to reflect a true and fair position.
- To undertake research, training and continuous development in order to maintain a thorough and in-depth knowledge of technical contracting issues, changes to legislation and accounting regulations relating to contracting.

### **POLICY AND SERVICE DEVELOPMENT**

- To provide advice and analytical support to the Senior Finance Managers.
- To represent the line manager where required on groups reviewing information flows for contracting.
- Working with other departments to secure sustainable information flows in order to capture income and record, manage and monitor expenditure levels.

## **FINANCIAL AND STAFF RESOURCES**

- The post holder's involvement with financial resources is through the contracting processes at an organisational level.

## **INFORMATION RESOURCES**

- Ensure the prompt analysis of activity information from within the Health Board for Contracting purposes, and put procedures in place with the other departments to improve data collection when required with the intention of maximising income.
- To provide regular reporting on financial contract performance.

## **FREEDOM TO ACT**

- To operate within organisational and professional parameters.
- It is essential the post holder can prioritise and organise their own work to meet strict deadlines.

## **PHYSICAL, MENTAL AND EMOTIONAL EFFORT**

- Frequent and sustained use of a computer is required in manipulating large quantities of data and preparing analysis and reports.
- Intense concentration will be required on occasions.
- The potential exists for the post-holder to liaise with and respond directly to Patients in respect of their Individual Funding Request, for treatment within Wales, England or Abroad.

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## **GENERAL REQUIREMENTS**

### **Competence**

At no time should the postholder work outside their defined level of competence. If there are concerns regarding this, the postholder should immediately discuss them with their manager/supervisor. Employees have a responsibility to inform their supervisor/manager if they doubt their own competence to perform a duty.

### **Registered Health Professional**

All employees of the LHB who are required to register with a professional body, to enable them to practice within their profession, are required to comply with their code of conduct and requirements of their professional registration.

### **Supervision**

Where the appropriate professional organisation details a requirement in relation to supervision, it is the responsibility of the post holder to ensure compliance with this requirement. If employees are in any doubt about the existence of such a requirement they should speak to their Manager.

### **Risk Management**

It is a standard element of the role and responsibility of all staff of the LHB that they fulfil a proactive role towards the management of risk in all of their actions. This entails the risk assessment of all situations, the taking of appropriate actions and reporting of all incidents, near misses and hazards.

### **Records Management**

As an employee of the LHB, the postholder is legally responsible for all records that they gather, create or use as part of their work within the LHB (including patient health, financial, personal and administrative), whether paper based or on computer. All such records are considered public records, and the postholder has a legal duty of confidence to service users (even after an employee has left the LHB). The Postholder should consult their manager if they have any doubt as to the correct management of records with which they work.

### **Health and Safety Requirements**

All employees of the LHB have a statutory duty of care for their own personal safety and that of others who may be affected by their acts or omissions. The postholder is required to co-operate with management to enable the LHB to meet its own legal duties and to report any hazardous situations or defective equipment. The postholder must adhere to the LHB's risk management, health and safety and associated policies.

### **Flexibility Statement**

The duties of the post are outlined in this job description and person specification and may be changed by mutual agreement from time to time.

### **Confidentiality**

The Postholder must at all times be aware of the importance of maintaining confidentiality and security of information gained during the course of their duties. This will in many cases include access to personal information relating to service users. The postholder must treat all information whether corporate, staff or patient information in a discreet and confidential manner in accordance with the provisions of the data protection act 1998 and organisational policy.

### **Promoting Diversity and Dignity at Work**

The LHB is committed to promoting diversity in employment and dignity at work. It recognises that discrimination and harassment is unacceptable and that it is in the best interests of the LHB and the population it serves to utilise the skills of the total workforce. The postholder must comply with and adhere to the equal opportunities and dignity at work policies.

## PERSON SPECIFICATION

**Job Title:** Finance Officer (Contracts)

**Grade:** 4

	<b><u>ESSENTIAL</u></b> The qualities without which a post holder could not be appointed	<b><u>DESIRABLE</u></b> Extra qualities which can be used to choose between candidates who meet all the essential criteria	<b>METHOD OF ASSESSMENT</b>
<b>QUALIFICATIONS</b>	<ul style="list-style-type: none"> <li>AAT technician level qualification or equivalent, or proven experience and ability to work at that level</li> </ul>	<ul style="list-style-type: none"> <li>Good general standard of education</li> </ul>	<p>Application Form/CV</p> <p>Interview</p>
<b>EXPERIENCE</b>	<ul style="list-style-type: none"> <li>Experience of working in a finance department in a large organisation</li> <li>Experience of working with computers and computer accounting and financial reporting software</li> </ul>	<ul style="list-style-type: none"> <li>Experience of working within NHS policy and procedure, particularly with regards to the National Payments By Results.</li> <li>Detailed experience of working within an NHS contracting / income environment and with NHS practices and legislation</li> </ul>	<p>Application Form/CV</p> <p>Interview</p>
<b>SKILLS</b>	<ul style="list-style-type: none"> <li>Ability to investigate, analyse and discuss routine and complicated queries with finance and non-finance staff, customers or suppliers.</li> <li>Ability to work under pressure, prioritise and meet deadlines.</li> <li>Ability to work with a high degree of accuracy</li> <li>Excellent key board skills (accuracy and speed of data input)</li> <li>Ability to design and manage complex spreadsheets for the management and control of non-contract income or expenditure</li> </ul>	<ul style="list-style-type: none"> <li>Ability to communicate effectively in Welsh and English</li> <li>Flexible approach</li> </ul>	<p>Application Form/CV</p> <p>Interview</p>

<b>KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>• Knowledge and understanding of accounting procedures and ledger reconciliation controls, VAT, income, expenditure and account code structures.</li> <li>• Sound knowledge and understanding of Financial Management Systems.</li> </ul>		Application Form/CV  Interview
<b>PERSONAL QUALITIES</b> <i>(Demonstrable)</i>	<ul style="list-style-type: none"> <li>• Professional and conscientious</li> <li>• Highly self-motivated.</li> <li>• Ability to work as part of a team and to manage own work to meet deadlines</li> <li>• Friendly open approach</li> </ul>		Application Form/CV  Interview
<b>OTHER RELEVANT REQUIREMENTS</b> <i>(Please Specify)</i>		<ul style="list-style-type: none"> <li>• The ability to travel across sites and within the geographic area of North Wales</li> </ul>	Document Check

# Organisational Chart

