

# Candidate Information Pack

## Including Job Description & Person Specification



Croydon Health Services provides integrated NHS services to care for people at home, in schools, and health clinics across the borough as well as at Croydon University Hospital and Purley War Memorial Hospital.

CUH provides more than 100 specialist services and is home to the borough's only Emergency Department and 24/7 maternity services, including a labour ward, midwifery-led birth centre and the Crocus home birthing team.

Purley War Memorial Hospital (PWMH) in the south of the borough offers outpatient care, including diagnostic services, physiotherapy and ophthalmology services run by Moorfields Eye Hospital, alongside an onsite GP surgery.

Our experienced district nursing teams, Allied Health Professionals and community matrons look after for people of all ages across Croydon and our Children's Hospital at Home cares for children with long-term conditions without them having to come to hospital.

We are a very close-knit and friendly organisation where everyone of our 3600 members of staff is valued. We strongly believe that our employees are our greatest asset.

**Join us and be a part of the team that is making Croydon proud.**



## Our values

We will always be **professional**, **compassionate**, **respectful** and **safe**.

### Professional

- Set ourselves very high standards and share best practice
- Keep our uniforms smart, and be professional and consistent in our approach
- Work in partnership to best support our community's needs
- Use resources wisely without compromising quality or safety

### Compassionate

- Treat everyone as we would want to be treated ourselves
- Demonstrate kindness, dignity, empathy and compassion
- Make time for the people we are caring for, to understand their needs and wants
- Organise our services to give people the best possible experience of care

### Respectful

- Be courteous and welcoming, and introduce ourselves
- Value the diversity and needs of everyone
- Always involve people in decisions about their care, listening to and respecting their wishes
- Appreciate the contribution that staff from all backgrounds bring to our services

### Safe

- Be open and honest in everything we do, sharing what we do well and admitting our mistakes, to constantly improve our care
- Protect the confidentiality of those in our care and show sensitivity to people around us
- Feel free to raise concerns so we are always learning
- Make time for training and development and support research so people always receive the highest standards of care.



## JOB DESCRIPTION

<b>JOB TITLE</b>	<b>Management Accountant</b>
<b>DIRECTORATE</b>	<b>Finance Directorate</b>
<b>BAND</b>	<b>5</b>
<b>RESPONSIBLE TO</b>	<b>Finance Manager</b>
<b>ACCOUNTABLE TO</b>	<b>Finance Business Partner</b>

### **KEY WORKING RELATIONSHIPS:**

Finance Department; Associate Directors of Operations, Associate Directors of Nursing, Service Managers, General Managers; Information Services; Clinicians; and other external partners.

### **JOB SUMMARY**

- The main objectives of the Finance Department are to provide accurate financial information, which supports effective decision making and to complete statutory annual accounts and monthly returns as required. Within this, there is a key focus on customer service to ensure that managers are provided with operational tools to both monitor and evaluate their financial performance.
- The Finance Department at CHS consists of core finance functions (Business Services, Financial Management, Financial Services and Procurement).
- There are around 70 staff within the overall finance department. Within this the Financial Management team comprises of 14 qualified and unqualified accountants and support staff.
- To maintain the financial ledger, provide financial management support and advice to Clinical Groups
- To process accounting information in accordance with the agreed monthly accounting timetable and ensuring that the clinical groups reporting requirements are met.
- To assist in the production of timely and accurate reporting of the financial position to the Business Partner and Finance Manager and clinical and non-clinical leads within the directorate.
- To provide support to the operational leads of all financial aspects within the directorate, to provide help and guidance in ensuring that expenditure remains within budget.
- To promote a customer focussed ethos for Financial Management department.



## **MAIN DUTIES AND RESPONSIBILITIES**

### **Key Tasks:**

- Assist in preparation of annual budget for Directorates in accordance with the Trust's budgeting policies.
- Calculate accruals, prepayments and adjustments to be reflected in the monthly management accounts and maintain a clear audit trail by means of adherence to trust financial procedures and International Financial Reporting Standards (IFRS)
- Generate, print and circulate standard reports, including year-end income and expenditure forecasts, to enable the effective monitoring of actual performance of budget centres against budget.
- Ensure that monthly financial performance information is communicated to budget holders within the Group(s) and that any issues raised are addressed in an appropriate and timely fashion.
- Calculate and input budget amendments, income and expenditure accruals and adjustments to the Trust's general ledger system in order to maintain the integrity of financial reporting,
- Provide robust analysis of variances against budget, including the impact of clinical activity where appropriate, and to inform effective management of budgets within the group.
- Maintain records and controls of approved budgets to provide a clear audit trail of changes both non-recurring and recurring.
- Prepare cost estimates in an appropriate form and in a timely manner for use by directorate managers and other budget holders, which will inform decisions about the use of resources, including staffing levels.
- Provide financial advice and assistance to Directorate Budget Holders and Managers.
- Discuss a range of financial and non-financial issues with managers, Directorate staff, external organisations and non-financially minded personnel, which may require the explanation of complicated and/or contentious points.
- Collect data from a variety of sources to investigate, analyse and resolve a range of complex financial and non-financial queries.
- Adapt information systems to meet the specifications of others. Prepare and distribute specialty finance reports to the Directorate Management teams. This includes a month by month analysis of the pay and non-pay budget and costs.
- Supervise Finance Trainees, including delegation of tasks as appropriate.
- Participate in the formal training of financial and non-financial staff in financial and performance matters.
- Maintain effective working relationships with colleagues and personnel internal and external to the Trust, ensuring that work is carried out efficiently, to a high standard thereby delivering a professional service focused on achieving a high level of customer satisfaction.
- Adhere to the Trust's Standing Orders and Standing Financial Instructions.
- Deal with frequent interruptions from third parties, which may require changing from one task to another in response to requests for specific information by a specific deadline.

### **Any Other Duties within the Framework of the Post**



1. To take responsibility for own personal development.
2. The post holder will be required to undertake any other duties and responsibilities within the framework of the post.
3. Due to the Trust's commitment to continuous improvement and in light of the changing needs of the organisation it is likely that the post will evolve over time. These duties will be subject to regular appraisal and any amendments will be made in conjunction with the post holder.
4. To demonstrate ability to prioritise, flexibility in undertaking ad-hoc duties, as and when required, ensuring the efficient functioning of the Finance department.
5. To ensure that the Trust Standing Orders and Standing Financial Instructions and procedures are adhered to at all times.
6. To identify, redesign and implement changes to own areas of working practices to improve performance and efficiency, maintaining procedure records and audit trails for all major tasks undertaken.

### **GENERAL**

*The following statements must be included (within the exception of 7 which only applies to clinical staff and 9, which only applies to posts that require professional registration).*

1. To work in accordance with the Trust's Values to consistently demonstrate the behaviours required.
2. The post holder is required to carry out his/her role in accordance with the organisation values, standards and behaviours, in a Professional, Compassionate, Respectful and Safe way.
3. To ensure that Croydon Health Services Trust's policies and procedures are adhered to.
4. To have responsibility for the Health, Safety and Welfare of self and others and to comply at all times with the requirements of the Health and Safety Regulations and the Trust's Health and Safety policies and procedures.
5. To ensure confidentiality at all times, only releasing confidential information obtained during the course of employment to those acting in an official capacity in accordance with the provisions of the Data Protection Act and its amendments.
6. To work in accordance with the Trust's policies to eliminate unlawful discrimination and promote equality and diversity in the workplace. To positively promote at all times equality of opportunity in service delivery and employment in accordance with Trust policies, regardless of age, disability, race, nationality, ethnic or national origin, gender, religion, belief, sexual orientation or domestic circumstances.
7. To adhere to the Trust Infection Control Policy, procedures and guidelines, and in particular practice strict hand hygiene at all times while carrying out clinical duties, in line with the responsibilities placed on employees by the Health Act 2006: Code of Practice for the prevention and control of healthcare associated infections (HCAIs). The prevention and control of HCAIs must be embedded into everyday clinical practice and applied consistently.
8. All clinical staff hold responsibility for ensuring they have sound knowledge of standard infection control precautions and that no omission on their part or within the sphere of their responsibility is detrimental to the interests or safety of their patients, visitors and colleagues. Clinical staff must keep



their infection control knowledge and skills up to date by attending the Trust's mandatory infection control training, a record of which will be kept and information provided to line managers as required.

9 To comply with the Trust's Safe Guarding Children and Vulnerable Adults policies, procedures and protocols. All individual members of staff (paid or unpaid) have a duty to safeguard and promote the welfare of children, young people and vulnerable adults This will require you to:

- Ensure you are familiar with and comply with the London Child Protection Procedures and protocols for promoting and safeguarding the welfare of children and young people.
- Ensure you are familiar and comply with the Croydon Multi Agency Safeguarding Vulnerable Adults Pan London Procedures.
- Ensure you are familiar and comply with local protocols and systems for information sharing.
- Know the appropriate contact numbers and required reporting lines.
- Participate in required training and supervision.
- Comply with required professional boundaries and codes of conduct

NOTE:

- A child is someone under the age of 18 (this would include unborn children).
- A vulnerable adult is 'someone who is or may be in need of community care services by reason of mental or other disability, age or illness; and who is or may be unable to take care of him or herself, or unable to protect him or herself against significant harm or exploitation' (this includes carers).

Copies of the Protocols and Procedures are available on the Trust Intranet under Child Protection. Staff are advised on how to access the appropriate contact numbers and the Protocols and Procedures when attending Safeguarding training. Updates and revisions are notified to all staff via 'What's New'.

10 To work within the CCAB Code of Professional Conduct and Scope of Professional Practice.

10. Budget Holders are responsible for adherence to Standing Financial Instructions

11. Managers are responsible for adherence of maintaining expenditure within budget and addressing deviations from budget

12. To undertake such other duties as may be reasonably required from time to time as are consistent with the responsibilities of the post.

## You are the difference –Staff Pledges

All staff are expected to demonstrate a considerate and respectful attitude.

I will always introduce myself to patients and other staff "Hello my name is"

If I see that someone looks like they need help, assistance or they look lost – I will always – Can I help you?

If I can't help you I will always ensure that I refer you to someone who can

If I see behaviour that is inappropriate I will feel empowered and supported to always challenge it





This job description is not an exhaustive document, but is a reflection of the current position. The job holder may from time to time be asked to undertake other reasonable duties. Any change will be made in discussion with the job holder in light of service needs.

### **Job Description Agreement**

This job description can be updated annually as part of the personal development plan.

This job description has been updated and agreed by:

Current post holder: .....

Date: .....

Line Manager: .....

Date .....



## PERSON SPECIFICATION

**JOB TITLE:** Management Accountant

**BAND:** 5

HEADINGS	ESSENTIAL	DESIRABLE	HOW TESTED
<b>EDUCATION AND QUALIFICATIONS</b>	<p>Educated to Degree level (2.2 or above)</p> <p>Part CCAB / CIMA qualified or AAT qualified/ <b>Or</b> can demonstrate good progress towards completing qualification.</p>		Certificate
<b>KNOWLEDGE AND UNDERSTANDING</b>	<p>A basic understanding of the UK healthcare system</p> <p>Minimum one-year experience of working within NHS Management accounting environment</p> <p>Knowledge of financial and accounting procedures and NHS Finance policies.</p>	Strong IT skills with ability to use full range of relevant financial software.	A, I
<b>EXPERIENCE</b>	<p>Experience to interpret and present financial information in a meaningful way to aid decision making.</p> <p>Experience of providing budgetary support to non-finance staff.</p> <p>Experience of liaising with budget holder on regular basis.</p>		<p>A, I</p> <p>A, I</p> <p>A, I</p>





HEADINGS	ESSENTIAL	DESIRABLE	HOW TESTED
	Experience of analysing problems and identifying solutions		A,I
<b>SKILLS/ABILITIES/ PERSONAL QUALITIES</b>	Knowledge and application of Microsoft Office packages, in particular Excel and Word.	Good analytical skills and an ability to evaluate and monitor progress against monthly targets.	A,I
	Good written and verbal communication skills	Adaptable to change, conflict and demands of a complex workload.	A,I,T
	Ability to communicate financial issues to non-finance staff and answer any questions effectively	Punctual and flexible across hours of work when required	A,I
	Good planning, organisational and time management skills - track record of meeting deadlines	Frequent requirement to work for long periods sitting and using computer equipment.	A,I
	Good presentational skills. A corporate / team player who works well with staff of all disciplines and grades		A,I
	Ability to challenge to process and system		
	Ability to work independently using own initiative under pressure with prioritisation skills and ability to deliver multiple tasks.		A,I
			A,I

