

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 staff take care of people of all ages across the borough of Croydon.

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

JOB TITLE	Overseas Visitors and Private Patient Manager
DIRECTORATE	Finance
DEPARTMENT	Overseas Visitors and Private Patient
BAND	7
RESPONSIBLE TO	Assistant Director of Finance
ACCOUNTABLE TO	Financial Controller
RESPONSIBLE FOR	Management of Overseas Visitors and Private Patient services, line management of three staff.

Job Purpose:

The post holder will be responsible for the overall management and performance of the overseas visitors and private patient services utilising specialist knowledge of Overseas Visitor hospital charging regulation 2015, financial and accounting procedures, financial aspects of NHS legislation and NHS finance policies.

To lead and to ensure the Trust's Overseas Visitors and Private Patients team in the on-going delivery and development of effective and robust processes to support the directorates and service delivery, especially in identifying Overseas Visitors that are not eligible for NHS treatment.

To comply with Department of Health and Social Care (DHSC) requirements in regard to overseas visitors' identification and cost recovery regime..

They will participate in projects and work streams to deliver corporate aims, implementing changes to policy and procedure to facilitate continuous service improvement in their day to day work, investigates highly complex enquiries, providing strategic business planning advice

The post holder will be required on a regular basis to operate with limited direction and to source and absorb guidance relevant to their job role and be able to work to strict deadlines and be flexible and able to adapt to change.



Key Relationships:

- Other senior managers within the Trust and Finance Department.
- Trust stakeholders (e.g. Consultant, clinician, ward sister)
- Internal Audit and External Audit.
- External bodies (DHSC, NHSE, Other NHS organisations, patient)

Management/Budget Responsibility:

1. Responsible for the management, performance and disciplinary issues of Overseas Visitors and Private Patients team.
2. Ensuring a robust team that has the capability and capacity to deliver the challenging local and national objectives by providing professional leadership, coaching, mentoring and personal development planning.
3. To redesign and develop better working practices (e.g. internal control, system controls information) within the department.
4. To write management reports and to complete them within agreed timescales.
5. Control the OSV and PP team budget and authorise expenditure; e.g staff training, stationery, office equipment.
6. Authorise all expenditure as per Trust's SFI.
- 7.

Scope of Authority:

The post holder will be expected to:

1. Exhibit a proactive and confident approach to their work and ability to multitasking;
2. Influence and support Trust managers, clinicians and staff through positive and supportive working relationships.
3. Exercise autonomy in the interpretation of NHS, Trust and professional policies, guidelines and legislation and make appropriate decisions on how to apply them in the work situation and in giving advice to other managers and staff.
4. The nature of the role demands autonomy, to challenge and change process and direction within a demanding and dynamic setting.



5. To demonstrate high level judgement when dealing with complex cases or urgent issues out of normal hours, and without reference to usual escalation processes with the finance department or operational management teams.

Key Duties and Responsibilities

Planning, Policies and Procedures

1. To be responsible for the overall management and performance on the development of policy and business processes within Private Patients and Overseas Visitors Team to identify and explore opportunities for providing improved services and income.
2. To keep up to date with national policy and regulations issue by the DHSC and working closely with the Financial Controller (Financial Services) to develop financial policies and procedures (introduce new procedures where necessary) for Private Patients and Overseas Visitors.
3. Liaise with Business Services to ensure that all tariffs are up to date and fully reviewed annually.
4. To be responsible for Overseas Visitors and Private Patients income budgeting and Operating Plan.
5. To ensure that financial activity and other performance targets in the overseas visitors area are accurately delivered in line with trust objectives, which work to the Department of Health and Social Care guidelines.
6. Working closely with the Cerner team, to develop robust reporting mechanisms for reporting of Overseas Visitors activity.
7. Liaise with Communications Team to incorporate use of Trust intranet and Internet in providing bespoke advice which will be of immense help to direct potential overseas visitors from EEA and provide specialist response to various frequent asked questions to any potential overseas visitor planning to receive care at the Trust.
8. To engage constantly with HR, Doctors, Clinicians and front line staff to incorporate overseas visitors training and presentations into the Trust's Local induction process which makes it easier to pass on the message about overseas visitors not entitled to free treatment.

Service Delivery

1. Required to plan and carry out the effective day-to-day management and performance of the team to ensure that the Trust's objectives are successfully implemented.
2. Monitoring and managing activity, identifying when performances falls below set standards. Analyse and interpret a range of options in highly complex situations, making judgements and deciding upon and taking corrective action to ensure that all performance targets are



achieved. Ensuring that we work to the guidance and work with governance in areas of high complexity, where legal requirement may be sort.

3. To ensure that the team provides high quality services, responsive to the needs of patients and to the areas being utilised for service delivery.
4. To ensure that all correspondence is sent out in a timely manner, ensuring full payment (deposit) is secured up front from overseas visitor who is not exempt from charging.
5. Ensure adequate business continuity procedures are in place so the Trust can continue to provide essential services to the patients.

Financial Duties

1. To co-ordinate internal and external audit visits; to ensure that all agreed internal and external audit recommendations relating to Overseas Visitors and Private Patients are implemented quickly and effectively
2. Developing partnership arrangements with NHS SBS Debt Management Team and Debt Recovery Agency in regard to overseas visitors and private patient debt management; develop procedures aimed at recovering income where appropriate.
3. Establish financial control mechanisms, including responsibility for invoices to be raised in a timely manner therefore obtaining clinical coding in time.
4. To analyse long overdue debts and to advise on appropriate provisions for bad debts to the Audit Committee for write off.
5. To provide an overview and commentaries of overseas and private patient income and respective risks, escalating to senior management teams as appropriate (e.g. monthly income analysis, trends analysis and, variance analysis report).
6. Produce management reports for Audit Committee and OSV/PP users.
7. Analyse highly complex Overseas Visitors and Private Patient's problems, outlining assumptions and risks and recommending possible courses of action.
8. To lead on strategic pricing process and maintaining an up to date private patient price list.
9. To ensure data accuracy, security and implement and monitor against Data Quality targets.
10. To undertake research and benchmarking (overseas visitors and private patient data via NHSE portal) to ensure the Trust are following best practices and are able to compare against both NHS organisations and private sector organisations.
11. Together with the Financial Controller, produce Performance Financial Reporting (PFR) returns (OSV section), as well as any other returns required by Assistant Director of Finance or NHSE.
12. Respond to Freedom of Information requests.



Decisions, Judgements and Review of Work

1. The post holder is expected to anticipate problems and resolve them in a professional manner.
2. The post holder has delegated authority to make decisions in line with internal and external policies, procedures and statutory requirements, and in line with best practice guidelines
3. The post holder is expected to make judgements involving highly complex facts or situations which require the analysis, interpretation and comparison of a range of options whilst minimising the financial risk to the organisation.
4. The post holder is expected to demonstrate a high degree of personal initiative and to work with minimal supervision and direction, but within a team-based environment.
5. Most of the activities and work of the post holder will be self-initiated and will be consistent with the responsibilities in the job description. The post holder will meet regularly with the Financial Controller and Assistant Director of Finance to discuss operational issues, remedial action and performance against set objectives.
6. To continually review information held within financial systems, thereby ensuring that proper accounting treatment has been applied at stages, to facilitate the production of timely and accurate data for the compilation of monthly reporting.
- 7.
8. Discussing with Consultants, Financial Controller on OSV/PP financial decisions which may adversely affect OSV/PP patients.
9. The post holder may be required to provide highly complex, sensitive or contentious information for presentation to senior management teams.
10. Develop in-depth understanding of the finance Oracles system to ensure the ability to analyse and produce variety of information from different systems appropriate to the needs of financial analysis, reporting, investigation of financial queries and reconciliation.

Communication and Other.

1. To be able to have difficult and complex conversations with patients, carers and clinical staff. To respond sympathetically to the needs of the patient with respect to their clinical condition and its severity, but be decisive in accordance with the Overseas Visitor Charging Regulations.
2. To establish effective communications and working relationships within the Finance department and other clinical directorates, patients, overseas insurers, other insurance companies, NHSE, DWP and UK Border Agency.



3. To communicate issues both within the Finance department (NHS SBS Accounts Receivable Team and Business Services), Information Services and Data Quality, ensuring that queries are dealt with in a timely and professional manner.
4. To act as the point of escalation in managing conflict and difficult situations faced by the service. This will include ad-hoc enquiries from patients or relatives on a variety of matters including accounting enquiries, and assessment of free NHS treatments. To deal with all complaints timely and in accordance with Trust policy and that lesson are learned and changes made where appropriate.
5. To attend the Overseas Visitors Steering Group and service operational meetings to promote the work of Overseas Visitor team. To produce written reports to a high standard within the standard monthly reporting framework.
6. Be innovative; working closely with NHS England to formulate and design an effective up to date system, using the latest technology to enhance the identification of OSV patients.
7. To act as a change agent and role model to challenge, motivate and overcome barriers to improve the effectiveness of the departments.
8. Lead contact with NHS SBS Debt Management Team to facilitate an effective debt collection system.

Line Management

1. Line manage of 3 OSV/PP staff so that they are trained and equipped to support you in effectively and efficiently to manage the capital schemes.
2. Managing the team, ensuring that work is properly delegated, and providing training, coaching, counselling, advice, support and effective cover.
3. Ensuring that appraisals and personal development reviews and plans are undertaken by all members of staff within team and that all team members are compliant with their statutory and mandatory training.
4. Responsible for the recruitment and development of staff including assessment and the delivery of training, coaching and counselling needs.
5. To manage staff performance and disciplinary issues if the circumstances arise.
6. Required to plan and carry out the effective day-to-day management of the team to ensure that the Trust's objectives are successfully implemented.
7. To maintain personal records for all staff under your responsibility, ensuring issues of staff discipline, grievance, poor performance, sickness and annual leave are dealt in line with Trust's policies and Internal procedures



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 as required.
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.

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 Here for You standards to consistently demonstrate the behaviours required to fulfil the promises we have made to the people of Croydon. These promises, developed with our patients, carers and staff help us deliver the pledges in the NHS Constitution and our own corporate objectives.

The postholder is required to carry out his/her role in accordance with the organisation "here for you" promises, standards and behaviours, ensuring that colleagues and the people we serve feel **cared for**, feel **in safe hands**, feel **confident** in their treatment, feel we **value their time**, and feel that our service continues to **improve** all the time

2. To ensure that Croydon Healthcare Services Trust's policies and procedures are adhered to.
3. 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.
4. 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.
5. 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.



6. 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 (HCAs). The prevention and control of HCAs must be embedded into everyday clinical practice and applied consistently.
7. All clinical staff holds 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.
8. 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. Staffs 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'.

9. 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.



13. This post involves the use of display screen equipment as a significant part of normal works and the job holder will be a user as defined in the Health & Safety Policy on work with DSE.

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



CROYDON HEALTH SERVICES NHS TRUST

FINANCE DIRECTORATE

PERSON SPECIFICATION

Job Title: Overseas Visitors and Private Patients Manager
Department: Overseas Visitors and Private Patient Team

Band: 7

Criteria	Essential	Desirable	Assessment Method
QUALIFICATIONS			
Educated to degree level (or equivalent)	X		C
An experienced and professional qualified accountant with current membership of CIMA or ACCA Professional Accountancy qualification or equivalent appropriate practical work based experience and working towards qualification.		X	C
Master degree or an MBA	X		
EXPERIENCE			
Significant experience in overseas visitors and private patients and working in a patient facing role.	X		A
Experience in handling difficult and complex conversations with patients or their relatives.	X		
Demonstrate experience of delivering training to multi-disciplinary groups.	X		A
Experience of presenting management information and reporting periodic financial information to non-financial managers.	X		A,I
Experience of developing and implementing new systems and procedures and guiding other staff on implementation and experience working on Oracle or other financial system.	X		I
Experience of analysing highly complex problems, sensitive information and identifying strategic solutions.	X		A,I
Previous experience of working at a senior level; i.e. reporting to senior management on financial issues.	X		
Prior staff management experience.	X		
Coaching/Training Non Finance staff.	X		



KNOWLEDGE AND UNDERSTANDING			
• A basic understanding of the UK healthcare system	x		A,I
• Knowledge of financial and accounting procedures and NHS Finance policies. e.g NHS Overseas Visitors Charging Regulations 2015	x		A,I
• Well-developed IT skills with ability to use full range of relevant financial software.	x		A,I,T
• Working knowledge of HR, Staff and Health and Safety Procedures.		x	A
• Knowledge and understanding of HRG coding, OUK regulations on Overseas Visitors	x		
SKILLS AND ABILITIES			
• Experience in accounting function and knowledge of income budgeting and planning.	x		A,I
• Knowledge and application of Microsoft Office packages, in particular Excel and Word.	x		A,I,T
• Knowledge of Cerner application, NHSI portal and MESH.	x		A,I
• Capable of working to achieve agreed objectives (meeting deadline) using own initiative	x		A,I
• Good written and verbal communication skills	x		A,I
• Good analytical skills and judgemental skills with ability to analyse assess and understand highly complex information. Knowledge of validation processes e.g. commissioning data set.	x		A,I
• Ability to priorities workload to ensure deadlines are met in timely manner	x		A,I
• Ability to communicate financial issues, complex regulations to clinical and service leaders and able to answer any questions effectively	x		A,I
PERSONAL QUALITIES			
• Good interpersonal skills with an ability to deal confidently with finance and non-finance officers.		x	I
• Courteous and professional in approach to all	x		I



work especially with patients or their relatives.			
• Good planning, organisational and time management skills - track record of meeting deadlines.	x		A,I
• Self-motivated, proactive and innovative.	x		I
• Good presentational skills.		x	I
• A corporate / team player who works well with staff of all disciplines and grades.	x		A,I
• Ability to use tact and diplomacy to resolve conflict.	x		I
• Aware of personal impact on team – must demonstrate awareness of equality and diversity principles / policies.	x		I
• Acts with integrity at all times.	x		I
• A track record of achievement.		x	A,I
• Ability to think laterally.	x		I
• Ability to challenge.	x		I
• Adaptable to change, conflict and demands of a complex workload / staff / public / political impact.		x	I
• Flexible and co-operative approach to work and working with colleagues.	x		I
• Ability to work independently using own initiative under pressure with prioritisation skills and ability to deliver multiple tasks in accordance with deadlines.	x		A,I
• Within agreed objectives, the post-holder will be expected to work under his / her own initiative in order to make decisions on a day to day basis regarding operational issues without reference to a manager.		x	I
• Frequent requirement to work for long periods with prolonged concentration.		x	I
• Frequent requirement to work for long periods sitting and using computer equipment.	x		I
• Ability to work flexibly outside of normal hours	x		I

as and when required.			
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A= application, C=certificate, I=interview, T=test

May 2021

