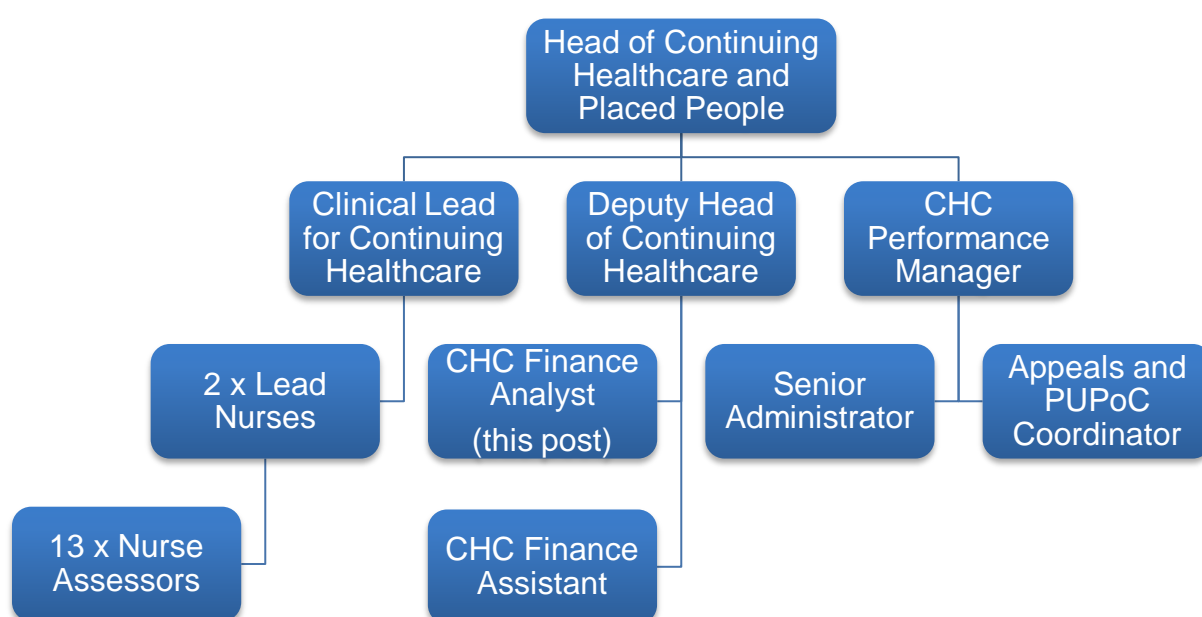


## JOB DESCRIPTION

<b>Job Title:</b>	Continuing Healthcare Finance Analyst
<b>Band/Pay:</b>	Band 5
<b>Department:</b>	Continuing Healthcare Team

### *Independent Sector*



### **Job overview**

To provide a high-quality Management Accounting service for the Continuing Healthcare Team including budget monitoring, payments to providers and contract flow. To work with the Deputy Head of Continuing Healthcare and the Continuing Healthcare Finance Assistant to give advice and guidance to the whole team on all aspects of finance relating to Continuing Healthcare, Funded Nursing Care and Adult Individual Patient Placements.

## **Main duties of the job**

- To ensure accurate Financial Forecasts are produced on a monthly basis linking in with the Deputy Head of Continuing Healthcare as well as the Finance Team
  - To support the provision of financial management/control and performance management information for all Continuing Healthcare, Funded Nursing Care & Individual Patient Placements which annually totals in excess of £40 million
  - This will include ensuring financial information is processed in a timely and accurate manner and in accordance with Trust procedures and policies
  - Producing monthly variance analysis, both month on month variances and variance to budget. Forecasting Independent Sector non-pay expenditure on a regular basis and assisting with yearend processes and procedures
  - Undertaking investigations into complex financial and activity related issues, undertaking costings and providing advice as appropriate
  - Support the Deputy Head of Continuing Healthcare by providing Management Accounting assistance to the budget holder, the Head of Continuing Healthcare and Placed People
  - Supporting the budget setting process and refining the accuracy of reporting
  - Ad hoc duties as required by the Deputy Head and Head of Continuing
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## **About your new team and department**

Continuing Healthcare is a volatile area that needs constant, up to date information and control. It is an area which has grown considerably over the years. It is necessary for the post holder to have in-depth knowledge and keep up to date with procedures and legislation regarding Continuing Healthcare and to be able use existing and bespoke systems to conduct the necessary monitoring and reporting required. Due to the unstable and constantly changing nature of the area, the post holder will need to be able to interrogate a number of care management and finance systems in order to deal with ad-hoc requests often at short notice to provide information for Senior Management. Such requests will need to be dealt with quickly and accurately as they will be filtered up to Director level and to external organisations. The team has an active caseload of approximately 850 clients at any point in time and looks after a budget of over £40 million per annum.

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## **Detailed job description and responsibilities**

### **Communication and working relationships**

- To liaise directly with Key Workers, Professional Leads, Brokers, Procurement Team and Finance Teams on contractual queries relating to CHC, FNC and IPP patients
- Provide support and guidance to CHC Nurse Assessors and Devon Partnership Trust CHC Nurses regarding costing packages of care, weekly and hourly care rates and setting up individual care contracts
- Provide support to CHC Nurse Assessors with calculating and setting up Personal Health Budgets
- First point of contact with the brokers, Health and Social Care Coordinators and Social Care staff within the zone teams as well as Care Direct Plus at Devon

County Council for any queries in relation to clients CHC, FNC and IPP contracts and manage queries until point of resolution

- Recording of highly sensitive personal and financial information
- The Continuing Healthcare team has a diverse client base which requires sensitive, professional and effective communication at all levels
- To liaise with staff in the zones at all levels and with senior management
- To liaise with the Management Accounts Team, Payments Team and wider Finance Team to resolve financial queries and highlight areas of financial risk
- Contact with Independent Sector providers and clients who have complaints
- Dealing with highly emotional/distressing situations with staff, clients and providers including patients with complex needs or who may be end of life
- Attendance at Complex Care Panel to provide finance support in relation to health funded cases

### **Analytical and judgement**

- Produce detailed monthly financial forecasting for Continuing Healthcare, Funded Nursing Care and Adult Individual Patient Placements including the production of a detailed explanation of variances to previous months' projections. This requires the interrogation of multiple systems and data sources and covers a variety of areas including Domiciliary Care, Residential and Nursing Care and Direct Payments
- Produce complex spreadsheets using Microsoft Excel which will need to include pivot tables and formulae

### **Responsibility for finance, equipment and other resources**

- Responsibility for the payment of invoices relating to Continuing Healthcare and IPP in the Unit 4 system up to £10,000 and responsibility for the checking and coding of invoices above that level. All invoices must be checked against CHIPPS and a record kept there for budget monitoring purposes. Resolve any discrepancies where they occur by liaising with zone teams, providers and payments teams
- Awareness of rules around VAT and checking that VAT is appropriately included on invoices and split out correctly on Unit 4
- Ensure package of care costs have been approved appropriately in line with the scheme of delegation and standing rules
- For backdated awards of Continuing Healthcare, the post holder is required to gather evidence of payments for the period of care in question and for the subsequent calculation of reimbursements. To ensure payments are made to the appropriate patient or their representative, the correct bank details are used and that the payment is coded appropriately on Unit 4. When these backdated awards fall into previous financial years, Retail Price Index Interest needs to be calculated and applied
- Provide finance support to the Complex Care Panel process for Health funded cases and attend the panel weekly. Scrutinise accuracy of financial content of Complex Care panel forms (Health funded cases only). Ensure agreed costs are incorporated into monthly budget monitoring
- Liaise with the procurement and payments teams as appropriate regarding new products and services
- Raise invoices as required. Occasional requirement to answer queries from debtors in relation to charges

- Responsible for checking the accuracy of coding of expenditure and income on the general ledger. Responsible for Unit 4 journals to recode spend on the general ledger. Collect, interpret and enter data into the Trust's General Ledger System
- On an annual basis, assist the Deputy Head of Continuing Healthcare to ensure correct uplifts are applied to CHIPPS and that CHIPPS is reconciled with Trust finance systems (TFM Res and DAD) and CareFirst6
- On an annual basis, assist the Deputy Head of Continuing Healthcare to ensure correct year end accruals and prepayments are calculated and that there is sufficient backing information for Audit purposes
- Provide information to Internal Audit and External Audit as and when required
- Investigate queries from budget holders, managers, colleagues from outside and within the CHC team, patients and their representatives and suppliers

### **Planning and organisation**

- Plan own workload to ensure all tasks are completed in accordance with the accounting timetable. Review own and departmental working practices identify areas for improvement and implement policy and service which may extend beyond own work area

### **Responsibility and accountability**

- Have a full awareness and operation of Trust accountancy policies and procedures, and follow those procedures when undertaking tasks
- Provide information and support to the budget holder (Head of Continuing Healthcare and Placed People)

### **Responsibility for patients and client care**

- First point of contact for patients and their representatives regarding reimbursements of backdated funding awards

### **Policy and service responsibility**

- Identify risks and raise issue logs for the audit trail of CHC, FNC, IPP and PUPoC claims to reduce risks to budget forecasts/actuals and to prevent client complaints and litigation

### **Responsibility for supervision, leadership and management**

- Supervise the CHC Finance Assistant to ensure that all package of care costs are input and updated into the CHIPPS system. The post holder must ensure that all essential details are collated and input in an accurate manner as this is a key risk area for the Trust
- Supervise the CHC Finance Assistant in monitoring changes to the cost of packages of care and reflecting these changes on CHIPPS as well as ensuring that the correct contracts are raised by the appropriate members of staff within the zone teams and the CHC Team
- Train and demonstrate financial systems and electronic reporting used by the post holder to new staff/new budget holders as required

### **Information technology and administrative duties**

- Detailed knowledge of the Trust's main Finance systems: TFM Res (Residential, Nursing and Direct Payments), DAD (Domiciliary and Day care)

and Unit 4 which process all expenditure for the Trust. Ability to interrogate these systems for budget monitoring purposes and on an individual client basis

- Extensive knowledge of care management systems CHIPPs, Paris, CareFirst6, Care Notes and IHCS in order to reconcile payments made and formulate commitments

#### **Responsibility for research and development**

- Assist the Deputy Head of Continuing Healthcare and the Performance Manager to develop reporting functions within CHIPPs for analysis of client numbers, highlighting areas of financial risk and answering a variety of ad-hoc queries from Senior Management which often come at very short notice
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## PERSON SPECIFICATION

Attributes	Essential	Desirable
<b>Qualifications and training</b>	<ul style="list-style-type: none"> <li>• Certificate Level/ Member of Association of Accounting Technicians (MAAT) or equivalent experience to degree level</li> </ul>	
<b>Knowledge and experience</b>	<ul style="list-style-type: none"> <li>• Proven experience in a financial / office environment with expertise in management accounting techniques</li> <li>• Detailed understanding of accounting procedures (reconciliation and balances, coding structures, journals, accruals and prepayments, general ledger, accounting IT systems) with the ability to interpret financial aspects of legislation and financial policies, audit procedures and adapt working practices accordingly</li> <li>• The ability to demonstrate a numerical, methodical and accurate approach to administrative and finance matters</li> <li>• Experience and expertise in monitoring of budgets and closure of accounts</li> </ul>	<ul style="list-style-type: none"> <li>• Detailed understanding of Continuing Healthcare and Funded Nursing Care procedures and legislation</li> <li>• Ability to interrogate Finance IT systems – TFM Res, TFM DAD, TFM Stats Reporting, Unit 4, CHIPPS</li> <li>• Ability to interrogate Care management IT systems – Paris, CareFirst6, IHCS, Care Notes</li> <li>• Experience of working with staff from other Teams within the Trust and external organisations</li> <li>• Knowledge of Adult Social Care</li> </ul>
<b>Specific Skills</b>	<ul style="list-style-type: none"> <li>• Communicate complex financial information to both finance and non-finance staff including resolving queries and providing information</li> <li>• Ability to liaise with finance staff from other NHS and Local Authority organisations to resolve issues</li> <li>• Discuss complex and sensitive financial issues with suppliers, patients, their representatives and solicitors which may be contentious,</li> </ul>	

	<ul style="list-style-type: none"> <li>including non-payment and late payment of invoices and reimbursement of fees</li> <li>• Requirement to communicate sensitive information to representatives and patients regarding eligibility for health funding including communicating with families or end of life and recently deceased patients</li> <li>• Effective interpersonal skills, including communication and listening skills</li> <li>• Negotiating skills, requirement to be persuasive and motivational at times</li> <li>• The ability to work effectively as part of a team</li> <li>• Pleasant and empathetic telephone manner</li> <li>• Demonstrate financial aspects of the CHC process to others within the CHC Team including clinical staff</li> <li>• Supervise and allocate work to more junior staff in the CHC team when required</li> <li>• Provide some induction training for new members of staff</li> <li>• Supervisory skills are essential</li> <li>• Advanced Microsoft Excel skills</li> </ul>	
<b>Requirements due to work environment/conditions</b>	<ul style="list-style-type: none"> <li>• Uses keyboard for significant proportion of the day</li> <li>• Due to working in a crowded open plan office, there is a lot of noise, interruption and a lack of privacy</li> </ul>	

<b>Physical skills</b>	<ul style="list-style-type: none"> <li>• Advanced Keyboard skills</li> <li>• Inputs financial and non-financial data into bespoke IT system and spreadsheets. Speed and accuracy are essential</li> <li>• Prolonged sitting in a restricted position as computer inputting for majority of working time</li> <li>• Occasional requirement for light physical effort when carrying notes etc. to be filed away</li> </ul>
<b>Physical effort</b>	<ul style="list-style-type: none"> <li>• Repetitive movement of hand and arm</li> </ul>

<b>Emotional effort</b>	<ul style="list-style-type: none"> <li>• High degree of sensitivity required when dealing with patients and staff who may be anxious or confused</li> <li>• Advise patients and their representatives regarding payments and reimbursement of fees</li> <li>• Dealing with patients and their representatives who have been unsuccessful in attaining CHC funding</li> <li>• Dealing with highly emotional and distressing situations with staff, patients and providers</li> </ul>
<b>Mental effort</b>	<ul style="list-style-type: none"> <li>• High of level of concentration required when formulating monthly forecasting from multiple complex datasets</li> <li>• Concentration also required when checking and reconciling information, making calculations, analysing data and designing spreadsheets</li> <li>• Answering complex financial queries from service providers, patients, general public and other staff</li> <li>• Ability to set, plan and meet various demanding deadlines often at short notice</li> <li>• Required to switch tasks frequently to deal effectively with ad-hoc requests and enquires from a variety of contacts, both internal and external. Queries from senior management often come at very short notice</li> <li>• Requirement for concentration when dealing with patient users who may be hard of hearing, confused or anxious</li> <li>• Frequent interruptions from staff, patients, other health professionals</li> <li>• Investigate and resolve financial queries and discrepancies with external suppliers and patients and their representatives</li> <li>• Analyse financial data to identify errors and resolve problems. Advise the Finance and Brokerage teams when errors are identified</li> <li>• Carry out complex calculations regarding reimbursements, invoices and backing documentation and decide whether and how to pursue over payments to both suppliers and other public sector organisations</li> <li>• Ability to analyse frequent highly complex problems involving many streams of data</li> <li>• Plans own workload to ensure monthly, quarterly and annual timetables are met</li> <li>• Ability to self-monitor and if necessary, make appropriate changes to improve effectiveness</li> <li>• Excellent organisational skills</li> <li>• Ability to cope with a varied workload and work under pressure/meet deadlines</li> </ul>