



University Hospitals of Morecambe Bay

NHS Foundation Trust

JOB DESCRIPTION

Job Title:	Assistant Finance Business Partner
Department/Ward:	Finance
Band:	5
Care Group:	Various
Responsible to:	Finance Business Partner/Deputy Finance Business Partner
Accountable to:	Senior Finance Business Partner
JOB SUMMARY:	To provide information and senior support to the Finance Business Partner/Deputy Finance Business Partner to ensure that timely, accurate and relevant income, expenditure and activity reports and ad hoc analyses are produced. To develop the general ledger and other financial reporting systems, carrying out set monthly tasks, systems maintenance and ad hoc problem solving to ensure smooth and accurate running of the ledger system.

Scope of Job / Key Elements:

Provide senior support to the FBP/DFBP in the production of income, expenditure and activity information and forecasts and support to staff and managers in the respective Care Groups including budget setting, budget monitoring, variance analysis and early identification of deviations from plan.

Regular communication with Care Group management teams, budget holders, staff and managers within specific Care Group(s). There is also occasional contact with external organisations, including other NHS bodies, non-NHS organizations and external audit.

Responsible for the dealing with Freedom of Information requests, ensuring the information is collated and sent as per the Trusts internal timetable.

Responsible for verifying monthly stock counts for the Care Group, where relevant.

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They are responsible for completing a number of tasks within tight deadlines, to provide accurate and timely financial information used by budget holders to aid in managing their budgets and to provide support to budget managers on using and understanding their budget reports.

The job requires continued use of the Trust's financial system (efinancials), in particular the functions and operations of the accounting ledger and other computerised systems including the Electronic Staff Record and complex spreadsheets. This requires high levels of concentration to achieve the required degree of accuracy.

The ability to work as part of a team, to provide cover within all areas of Financial Management (both Care Group and Corporate) and to ensure the confidentiality of all information, including patient, staffing and payroll details is essential.

General Ledger

Assist in the development of the efin system with particular reference to General Ledger. This includes being a member of efin development groups and the implementation of any developments.

Participate in the development and provision of a continuing internal efin training programme to enable all users to gain a standard knowledge of the system. This includes training of new members of staff on the efin system.

Working in conjunction with the relevant FBP/DFBP, the post-holder is required to use their initiative to manage their workload and carry out the general maintenance and monthly tasks and reconciliations associated with the Trust's General Ledger Financial Computer Systems by agreed deadlines.

Supporting ELFS in aspects of the ledger management and administration as per the agreed contract.

Working in conjunction with IT, the post-holder is responsible for maintaining, problem solving and developing the online financial reporting system.

Job Accountabilities:

Assist the FBP/DFBP in the preparation of the Care Group budget, including creation of the pay recosting file. Upload of budget data to the Trust's ledger and maintain a detailed record of this throughout the financial year.

Assist the FBP/DFBP in the preparation of accurate and timely monthly income, expenditure and activity reports and expenditure forecasts for the Care Group.

Monitor performance against budget, investigating and explaining variances between budget and actual and correcting errors where required, using own initiative or obtaining advice from appropriate manager where necessary.

Attend regular meetings with budget holders to discuss and advise on, their financial position, referring to FBP/DFBP as required and where necessary support the budget-holder's line manager in applying the provisions of the Trust's Financial Accountability Framework.

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Occasionally discuss cost reductions with specified budget holders as part of regular budget holder review meetings, in order to flag any further savings to assist the FBP/DFBP in identifying savings for the Care Group.

As required attend specified Heads of Service meetings each month to report department, Care Group and Trust financial position and answer any queries that may arise, referring queries to the relevant finance manager if required. Provide financial input where required to assist with decision making.

Advise budget holders within the Care Group on the uses and meaning of the monthly reports in order that they have better control and understanding of the budgets they manage.

Liaise with members of the Care Group management team on routine financial matters, assisting them with the making of routine decisions where required.

Provide guidance to budget holders and other non-finance managers regarding the Trust's Standing Financial Instructions (SFIs) and Financial Accountability Framework, seeking further advice from the appropriate finance manager where necessary.

Participate in the provision of budget-holder training courses run by the Financial Management team for the Trust's budget-holders.

Maintain a detailed record of Care Group budgets.

Assist the FBP/DFBP to maintain the Care Group's record of budget holders being managed via the Trust's Financial Accountability Framework.

Keep and regularly update a budgetary control folder as required by Audit.

Produce and maintain appropriate procedure notes in accordance with audit directives.

Produce detailed costings for budget holders for example, of plans to rearrange budgets and skill mixes, in order that best use can be made of the available budget.

Provide financial information to the SFBP/FPB to assist them in the financial appraisal of service change and cost reduction proposals.

Maintain and update the authorised signatory database, including controlling the restrictions of budgetary permissions of the Trust's budget holders in accordance with documentation.

Reconcile the Trust's staff lists to the budget statements, ensuring any discrepancies are notified to budget holders to enable them to be corrected through Employment Services.

Occasionally assist the SFBP/FPB in the preparation of the financial elements of any business cases as required.

Occasionally assist in the production of performance management and benchmarking information to allow monitoring of the Trust's financial performance.

Be actively involved within Care Group working groups to provide financial input. For example, analysing pay data to look at changes required to an on-call rota.

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Extract data from various computer systems to create, develop and maintain substantial spreadsheets in accordance with corporate and Care Group needs.

Participate in the development and implementation of new reporting, costing and budgeting methods.

Share knowledge amongst other team members to promote best practice and efficient working, including chairing a working group, on a rotational basis, for analysts to this end.

Action both internal and external monthly recharges, including raising monthly invoices as appropriate.

Liaise with Accounts Receivable and assist them in reducing outstanding debts from external organisations.

Occasionally assist the FBP/DFBP to set prices for services provided to external organisations.

Occasionally assist in stock-takes across the Trust, as and when required and provide independent assurance that the department's stock values are accurately recorded.

Supply ad-hoc reports and analysis as requested.

Liaise with managers and staff on financial queries throughout the Trust.

Maintain high quality up to date procedure notes for all tasks

On a rota with other Assistant Finance Business Partners update online budget and staff in post reports on a monthly basis for all Care Groups and liaise with IT to resolve any problems. Take an active role in developing this system.

Each member of staff is responsible for their own and other employees' health and safety. To this end each post holder must adhere to the Trust's Health and Safety and Fire policies and attend the relevant training as and when directed.

This job description is not exhaustive and will be reviewed and amended, with the postholder, when necessary.

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TERMS AND CONDITIONS

This post will be subject to the terms and conditions of the University Hospitals of Morecambe Bay NHS Foundation Trust.

CONFIDENTIALITY

Information relating to patients, employees and business of the Trust must be treated in strictest confidence. Under no circumstances should such information be discussed with any unauthorised person(s) or organisations. All staff must operate within the requirements of the Freedom of Speech policy.

SAFEGUARDING & PROTECTING CHILDREN

Everyone shares responsibility for safeguarding and promoting the welfare of children and young people, irrespective of individual roles. As an employee of the trust you will need to be aware of your responsibility in relation to safeguarding and protecting children. You will need to be aware of trust/local LSCB procedures and know how to contact named professionals, within the safeguarding team for advice and support.

ENVIRONMENTAL SUSTAINABILITY – NET ZERO CARBON

University Hospitals of Morecambe Bay NHS Foundation Trust are committed to sustainable development, social value and achieving the NHS Net Zero Carbon reduction targets. All employees must play their part and adhere to the principles in the Green Plan, this will ensure our services are efficient, sustainable and carbon emissions are reduced. As an employee you will be expected to conserve energy / water, minimise wastage in all formats, actively promote biodiversity and use sustainable transport whenever possible.

- **Energy:** Switch off non-essential electrical equipment and lighting when not in use. Report heating issues such as when buildings are too hot or too cold to the Estates Team.
- **Water:** Do not leave taps running and report all drips, leaks, and condensation issues to the Estates Team.
- **Waste:** Follow the Trust waste policy – Reduce – Reuse – Recycle. Do not over order equipment or medicines. Healthcare waste must be disposed of in line with the Trust's Waste Management policy.
- **Biodiversity:** Enhancing biodiversity has a wealth of positive outcomes for our colleagues, services users and the environment. Think of your site, can an area be improved to have a quality green space, specific planting for habitat improvement or the installation of a couple of bird boxes? Contact the Estates Team for further details.
- **Transport & Travel:** Where possible lift share, cycle, walk or use public transport.

HEALTH AND SAFETY

The Health and Safety at Work Act stipulates that it is the responsibility of each employee to observe all rules governing safety and conduct and as such safety equipment and Personal Protective Equipment provided must be used.

INFECTION CONTROL

The Trust is committed to protecting the health of all staff, patients and visitors to the Trust. As such all staff is personally responsible for compliance with all Trust and department infection prevention and control policies. Failure to comply with such policies and associated procedures is likely to lead to disciplinary action and may result in dismissal.

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MANUAL HANDLING

The post holder will be provided with adequate training in correct lifting techniques by a recognised lifting instructor.

NO SMOKING POLICY

A No Smoking Policy operates across all Trust sites.

QUALITY OF SERVICE

The trust is committed in its use of available resources to obtaining the best possible service for patients and staff. The Post holder must share this objective and seek to maintain and improve the quality of service provided.

EQUAL OPPORTUNITIES

The Trust is pledged to equal opportunities for all and is committed to ensure that no job applicant or employee receives less favourable treatment on the grounds of gender, marital status, age, race, colour, sexual orientation, creed, nationality, ethnic or national origin or disability. We promote flexible working opportunities wherever possible to enable staff to balance their work with their private lives.

TRAINING AND DEVELOPMENT

Maintain your professional standards in respect of education and training and ensure that you are aware of your specific area specialty training and needs analysis.