



The Blackmore Vale Partnership

The heart of the Community

JOB DESCRIPTION

JOB TITLE: Finance Manager

REPORTS TO: Partners

HOURS: Up to full time

Overview

The post-holder will ensure that the practice operates in a profitable and cost-effective manner in keeping with the financial aspirations of the Partners.

Job Summary/Main Purposes

- To provide support to the GP Partners in project work, and in the running of key systems and procedures such as accounts and identifying new business opportunities.
- To support the GP Partners in the promotion, monitoring and documentation of performance and quality standards within the practice, using IT and manual solutions. To become familiar with all relevant aspects of the clinical software system.
- To undertake specific assigned tasks, project support, or development / change work which may arise from time to time.

Job responsibilities

- Become involved with key aspects of Practice workload and be able to respond to information requests and updates as necessary, being able to run key tasks in the event of absence.
- Responsibility for Financial control including: -
 - Maintaining and increasing sources of income – analysing and reporting on threats and opportunities
 - Understanding of the Financial Implications of Contract Changes and Legislation
 - Minimising Expenditure
 - Entering all invoices and journals into the accounting software
 - Liaising with Partners and the Accountants
 - Payment of outstanding supplier accounts
 - Income generation, reconciliation of income received to expected income
 - Bank reconciliation

- Prepare payroll spreadsheets, recording of overtime and pay changes and forward to the payroll provider for the payroll run.
- Payment to HMRC and staff
- Appraising partners of up to date financial position
- Cash-flow monitoring and forecasting
- Management of bank accounts
- Produce costing reports when required
- Manage credit control, in particular high level or long-standing issues
- Produce financial management reports for the partners and report regularly on the financial position (monthly) to help make informed decision in relation to the practice.
- Manage the finance team with the year-end procedures to ensure all information for submission (outstanding debtors, folders etc) and answer/manage the collation of response to all queries in a timely fashion.
- First point of contact with the Accountants and the Practice Bank Managers.
- Through negotiation with the PCO and preparation and submission of regular development plans, ensure the practice receives an appropriate and equitable allocation of resources
- Understand and report on the financial implications of contract and legislation changes
- Administration of NHS Pension scheme
- To ensure that documentation exists to support performance standards across the full range of performance-based activity – QOF, Enhanced Services, KPIs etc
- Carry out in monthly, quarterly and annual claims as necessary
- Assist with writing and reviewing policies and protocols as necessary
- To undertake ad-hoc work related to the performance of the practice under the guidance of the Partners.
- To assist in providing support and training for current and new staff
- Maintain accurate records of staff training, including mandatory training
- To support the GP Partners in the routine maintenance of the building and all related procedures, e.g. Health & Safety, Fire Risk Assessment and Drills, Panic and Intruder Alarms, equipment calibration, etc.
- To support the Practice Manager in preparing for, welcoming and inducting new staff; including students and registrars admin
- Dealing with patients, and contacts within the NHS and other practices, both in person and on the telephone.
- Management of Finance Officer and support personal/professional development
- Management of Finance Assistant and support personal/professional development
- Any other reasonable task that may be required

Human resources

- Oversee the recruitment and retention of finance staff and provide a general personnel management service
- Ensure that all members of staff are legally and gainfully employed. Monitor skill-mix and deployment of staff
- Manage staffing levels within target budgets
- Evaluate, organise and oversee staff induction and training, and ensure that all staff are adequately trained to fulfil their role
- Develop and implement effective staff appraisal and monitoring systems

- Support and mentor staff, both as individuals and as team members
- Implement effective systems for the resolution of disputes and grievances
- Keep abreast of changes in employment legislation
- Maintain up-to-date HR documentation (including job descriptions, employment contracts and employment policies)

Organisational

- Convene meetings, prepare agendas and ensure distribution of minutes as necessary
- Develop Practice protocols and procedures, review and update as required
- Manage the procurement of practice equipment, supplies and services within target budgets
- Arrange appropriate insurance cover
- Ensure that the practice has adequate disaster recovery procedures in place
- Arrange appropriate maintenance for practice equipment

Patient services

- Ensure service development and delivery is in accordance with local and national guidelines
- Ensure that the practice complies with NHS contractual obligations in relation to patient care
- Maintain registration policies and monitor patient turnover and capitation
- Routinely monitor and assess practice performance against patient access and demand management targets
- Support the Managing Partner with patient groups

Confidentiality

In the course of seeking treatment, patients entrust us with, or allow us to gather, sensitive information in relation to their health and other matters. They do so in confidence and have the right to expect that staff will respect their privacy and act appropriately

- In the performance of the duties outlined in this job description, the post-holder may have access to confidential information relating to patients and their carers, practice staff and other healthcare workers. They may also have access to information relating to the practice as a business organisation. All such information from any source is to be regarded as strictly confidential
- Information relating to patients, carers, colleagues, other healthcare workers or the business of the practice may only be divulged to authorised persons in accordance with the practice policies and procedures relating to confidentiality and the protection of personal and sensitive data

Health & safety

- Ensuring job holders across the practice adhere to their individual responsibilities for infection control and health and safety, using a system of observation, audit and check, hazard identification, questioning, reporting and risk management.
- Maintaining an up-to-date knowledge of health and safety and infection control statutory and best practice guidelines.
- Using personal security systems within the workplace according to Practice guidelines

- Identifying the risks involved in work activities and undertaking such activities in a way that manages those risks across the business
- Making effective use of training to update knowledge and skills, and initiate and manage the training of others
- Using appropriate infection control procedures, maintaining work areas in a tidy and safe way and free from hazards, and initiation of remedial / corrective action where needed
- Actively identifying, reporting, and correcting health and safety hazards and infection hazards immediately when recognised
- Keeping own work areas and general / patient areas generally clean, identifying issues and hazards / risks in relation to other work areas within the business, and assuming responsibility in the maintenance of general standards of cleanliness across the business in consultation (where appropriate) with other sector managers
- Undertaking periodic infection control training (minimum annually)
- Routine management of own team / team areas, and maintenance of work space standards
- Demonstrate due regard for safeguarding and promoting the welfare of children.

Equality and diversity

The post-holder will support the equality, diversity and rights of patients, carers and colleagues, to include:

- Acting in a way that recognises the importance of people's rights, interpreting them in a way that is consistent with practice procedures and policies, and current legislation
- Respecting the privacy, dignity, needs and beliefs of patients, carers and colleagues
- Behaving in a manner that is welcoming to and of the individual, is non-judgmental and respects their circumstances, feelings priorities and rights.

Personal/Professional development

The post-holder will participate in any training programme implemented by the practice as part of this employment, with such training to include:

- Participation in an annual individual performance review, including taking responsibility for maintaining a record of own personal and/or professional development
- Taking responsibility for own development, learning and performance and demonstrating skills and activities to others who are undertaking similar work

Quality

The post-holder will strive to maintain quality within the practice, and will:

- Alert other team members to issues of quality and risk
- Assess own performance and take accountability for own actions, either directly or under supervision
- Contribute to the effectiveness of the team by reflecting on own and team activities and making suggestions on ways to improve and enhance the team's performance
- Work effectively with individuals in other agencies to meet patients' needs
- Effectively manage own time, workload and resources

Communication

The post-holder should recognize the importance of effective communication within the team and will strive to:

- Communicate effectively with other team members
- Communicate effectively with patients and carers
- Recognize people's needs for alternative methods of communication and respond accordingly

Contribution to the implementation of services

The post-holder will:

- Apply practice policies, standards and guidance
- Discuss with other members of the team how the policies, standards and guidelines will affect own work
- Participate in audit where appropriate

Person Specification – Finance Manager

ESSENTIAL (SKILLS)	DESIRABLE (SKILLS)
<ul style="list-style-type: none"> • Previous management or supervisory experience. 	<ul style="list-style-type: none"> • IT literate, including experience in using Word and Excel at intermediate level.
<ul style="list-style-type: none"> • Experience in dealing with external organisations at management level. 	<ul style="list-style-type: none"> • Experience in primary care/NHS/caring profession
<ul style="list-style-type: none"> • Studying for / already hold an accounting qualification, or equivalent experience 	<ul style="list-style-type: none"> • Accounting qualification
<ul style="list-style-type: none"> • Knowledge of employment law, health & safety legislation, risk assessment 	<ul style="list-style-type: none"> • Formal qualification in Finance and Management.
<ul style="list-style-type: none"> • Experience of staff appraisals, handling grievance and disciplinary issues 	<ul style="list-style-type: none"> • Experience of dealing with members of the public.
<ul style="list-style-type: none"> • Knowledgeable of recruitment, staff training and staff motivation 	<ul style="list-style-type: none"> • Previous experience in an analytical role.
<ul style="list-style-type: none"> • Experience of complex financial systems, bookkeeping and management accounts. 	<ul style="list-style-type: none"> • Familiarity with a variety of Windows-based software and Windows / network environment.
<ul style="list-style-type: none"> • Experience in using accounts packages. 	

ESSENTIAL (PERSONAL)	DESIRABLE (PERSONAL)
<ul style="list-style-type: none"> • Good sickness record (e.g. max 3 events in last 12 months) 	<ul style="list-style-type: none"> • NHS or recent practice experience
<ul style="list-style-type: none"> • Good communicator (verbal & written) both upwards and downwards 	<ul style="list-style-type: none"> • Checkable employment history > 3 years
<ul style="list-style-type: none"> • Numerate, and IT literate, including use of Word and Excel to intermediate or advanced level. 	<ul style="list-style-type: none"> • Evidence of organisational skills.
<ul style="list-style-type: none"> • Ability to work autonomously and initiate / self-direct own workload. 	<ul style="list-style-type: none"> • Evidence of recent self-directed learning or development.
<ul style="list-style-type: none"> • Evidence of the ability to grasp new concepts and work on a self-directed basis 	<ul style="list-style-type: none"> • Evidence of job stability (e.g. < 2 employers in last 10 years)
<ul style="list-style-type: none"> • Full driving licence and access to transport 	<ul style="list-style-type: none"> • Ability to work flexibly when the need arises
<ul style="list-style-type: none"> • Positive attitude and solutions focused 	