

UW HEALTH JOB DESCRIPTION

FINANCIAL SPECIALIST – CULINARY AND CLINICAL NUTRITION

Job Code: 440082	FLSA Status: Nonexempt	Mgt. Approval: M Waltz	Date: October 2020
Department: Culinary and Clinical Nutrition Services		HR Approval: J. Middleton	Date: October 2020

JOB SUMMARY

The incumbent is responsible for collaborating with other departments to perform detailed accounting, auditing, financial analysis and financial reporting duties within Culinary and Clinical Nutrition. This position is responsible for oversight of monthly budgeting, accounts payable and accounts receivable transactions for the department. This position requires interaction with both internal and external customers.

MAJOR RESPONSIBILITIES

- Prepares month end close out processes and procedures, such as preparing and importing journal entries, processing payroll deductions, charging expenses to accounts and departments for food, food supplies and catering events, reconciling procurement card transactions, and gathering and reporting key metrics for productivity and benchmark data reviews.
- Reviews monthly budget and organizes end of the month data to prepare monthly presentations for leadership team on actual vs budget, key metrics and benchmarks.
- Assists with weekly budget review for food and food expenses and retail revenue to ensure month-end budget remains within parameters.
- Generates reports, prepares invoices, and enters reimbursements and invoices as appropriate, following up on and correcting errors or discrepancies.
- Completes tender reconciliation for retail operations, including processing of credit card refunds.
- Identifies and develops solutions and processes that will improve efficiency, increase accuracy, and improve decision making within the department.
- Collaborates with department leaders to develop and oversee systems of checks and balances for various sources to ensure integrity of the information and processes.
- Participates in testing system enhancements and upgrades to department business applications.

ALL DUTIES AND REQUIREMENTS MUST BE PERFORMED CONSISTENT WITH THE UW HEALTH PERFORMANCE STANDARDS.

JOB REQUIREMENTS

Education	Minimum	Associate degree in Accounting, Business, Finance or related field. Two (2) years of accounting or accounts payable experience may be considered in lieu of the degree or experience outlined below.
	Preferred	Bachelor's Degree in Accounting, Business, Finance or related field.
Work Experience	Minimum	One (1) year of basic accounting experience.
	Preferred	
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> • Computer skills with proficiency in database, spreadsheet, and word processing software required. • Familiarity with academic medical center is preferred. • Ability to work independently and as a team to complete work with minimal supervision. • Ability to prioritize and work under pressure sufficient to meet deadlines. • Ability to concentrate as demonstrated by a high degree of accuracy entering data. • Ability to work in a fast-paced, multi-functional environment. • Strong oral, written and interpersonal communication skills. • Strong analytical skills with the ability to manipulate and understand complex information.

AGE SPECIFIC COMPETENCY (Clinical jobs only)

Identify age-specific competencies for direct and indirect patient care providers who regularly assess, manage and treat patients.

Instructions: Indicate the age groups of patients served either by direct or indirect patient care by checking the appropriate boxes below. Next,

<input type="checkbox"/>	Infants (Birth – 11 months)	<input type="checkbox"/>	Adolescent (13 – 19 years)
<input type="checkbox"/>	Toddlers (1 – 3 years)	<input type="checkbox"/>	Young Adult (20 – 40 years)

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Preschool (4 – 5 years)	Middle Adult (41 – 65 years)			
School Age (6 – 12 years)	Older Adult (Over 65 years)			
JOB FUNCTIONS				
Review the employee's job description and identify each essential function that is performed differently based on the age group of the patient.				
PHYSICAL REQUIREMENTS				
Indicate the appropriate physical requirements of this job in the course of a shift. <i>Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.</i>				
Physical Demand Level	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 50%; padding: 5px;">Occasional Up to 33% of the time</th> <th style="width: 50%; padding: 5px;">Frequent 34%-66% of the time</th> <th style="width: 50%; padding: 5px;">Constant 67%-100% of the time</th> </tr> </table>	Occasional Up to 33% of the time	Frequent 34%-66% of the time	Constant 67%-100% of the time
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X Sedentary: Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as docket, ledgers and small tools. Although a sedentary job is defined as one, which involves sitting, a certain amount of walking and standing is often necessary in carrying out job duties. Jobs are sedentary if walking and standing are required only occasionally and other sedentary criteria are met.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px; vertical-align: top;"> Up to 10# </td> <td style="width: 50%; padding: 5px; vertical-align: top;"> Negligible </td> <td style="width: 50%; padding: 5px; vertical-align: top;"> Negligible </td> </tr> </table>	Up to 10#	Negligible	Negligible
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Light: Ability to lift up to 20 pounds maximum with frequent lifting and/or carrying of objects weighing up to 10 pounds. Even though the weight lifted may only be a negligible amount, a job is in this category when it requires walking or standing to a significant degree.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px; vertical-align: top;"> Up to 20# </td> <td style="width: 50%; padding: 5px; vertical-align: top;"> Up to 10# or requires significant walking or standing, or requires pushing/pulling of arm/leg controls </td> <td style="width: 50%; padding: 5px; vertical-align: top;"> Negligible or constant push/pull of items of negligible weight </td> </tr> </table>	Up to 20#	Up to 10# or requires significant walking or standing, or requires pushing/pulling of arm/leg controls	Negligible or constant push/pull of items of negligible weight
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Medium: Ability to lift up to 50 pounds maximum with frequent lifting/and or carrying objects weighing up to 25 pounds.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px; vertical-align: top;"> 20-50# </td> <td style="width: 50%; padding: 5px; vertical-align: top;"> 10-25# </td> <td style="width: 50%; padding: 5px; vertical-align: top;"> Negligible-10# </td> </tr> </table>	20-50#	10-25#	Negligible-10#
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Heavy: Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px; vertical-align: top;"> 50-100# </td> <td style="width: 50%; padding: 5px; vertical-align: top;"> 25-50# </td> <td style="width: 50%; padding: 5px; vertical-align: top;"> 10-20# </td> </tr> </table>	50-100#	25-50#	10-20#
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Very Heavy: Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px; vertical-align: top;"> Over 100# </td> <td style="width: 50%; padding: 5px; vertical-align: top;"> Over 50# </td> <td style="width: 50%; padding: 5px; vertical-align: top;"> Over 20# </td> </tr> </table>	Over 100#	Over 50#	Over 20#
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Other - list any other physical requirements or bona fide occupational qualifications not indicated above:				

Note: The purpose of this document is to describe the general nature and level of work performed by personnel so classified; it is not intended to serve as an inclusive list of all responsibilities associated with this position.