

UW HEALTH JOB DESCRIPTION

FINANCIAL ANALYST

Job Code: 440070	FLSA Status: Exempt	Mgt. Approval: H. Brahm	Date: February 2022
Department: Finance		HR Approval: B. Haak	Date: February 2022

JOB SUMMARY

The Financial Analyst is responsible for performing a wide variety of financial reporting, modeling, and related analyses for assigned areas of responsibility. This position may prepare and review general ledger information, compile and prepare financial statements and reports, and may assist in annual budgetary procedures. The Financial Analyst independently uses financial principles to solve moderately complex business problems while performing forecasting, planning, and financial modeling related to income, profitability, liquidity, capital, leverage, asset and liability management or operating expense.

The Financial Analyst may perform additional duties requiring subject matter expertise in one or more of the following finance functions: General Accounting, Budget, Fixed or Capital Assets, Financial Reporting, or Treasury.

MAJOR RESPONSIBILITIES

- Identify, compile, and manage financial data efficiently from various sources.
- Process monthly general ledger entries; perform general ledger reconciliations and complex general ledger account analysis to assist with identifying and correcting inaccuracies.
- Prepare work papers, reconciliations, and schedules for various regulatory and financial audits; provide materials and explanations of data to auditors.
- Respond to all levels of management as needed for information requests as they relate to financial statements, budgets, projections, and other Accounting related areas.
- Research and calculate the impact of operational changes to budget, financial data, financial systems, etc. and the impact of the changes to the organization.
- Accurately report monthly financial activity of operational areas to senior leadership; research trends and variances.
- Assist in developing and implementing annual financial processes throughout the organization; including but not limited to developing and providing training and instructions, timelines, reports, and recommendations for improvement.

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

JOB REQUIREMENTS

Education	Minimum	Bachelor's Degree in Accounting, Finance, Business or another related field. Four (4) years of relevant finance or accounting experience may be considered in lieu of the degree in addition to the experience below.
	Preferred	Master's Degree in Accounting, Finance, Business or another related field
Work Experience	Minimum	Two (2) years of experience in accounting or finance that includes experience with computer systems, spreadsheet and database applications, data flow, report creation, and data interpretation
	Preferred	Four (4) years of experience in accounting or finance within a healthcare setting
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> • Knowledge of Generally Accepted Accounting Principles and governmental regulations as applied to modern health care financial management. • Knowledge of the principles of statistical analysis as applied to the development and design of financial reporting • Thorough knowledge of and experience in financial system applications and software • Experience in database development and management • Experience in Microsoft Office Suite (Excel, Access, Word, Outlook) • Ability to work effectively and independently managing tasks in a fast-paced environment • Excellent written and verbal communication skills • Analytical and problem-solving abilities with the ability to manipulate and

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	<ul style="list-style-type: none"> • understand complex information • Effective organizational and time management skills with proven ability to meet deadlines
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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,

	Infants (Birth – 11 months)		Adolescent (13– 19 years)
	Toddlers (1– 3 years)		Young Adult (20 – 40 years)
	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. *Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.*

Physical Demand Level	Occasional Up to 33% of the time	Frequent 34%-66% of the time	Constant 67%-100% of the time
X Sedentary: Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as dockets, 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.	Up to 10#	Negligible	Negligible
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.	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
Medium: Ability to lift up to 50 pounds maximum with frequent lifting and/or carrying objects weighing up to 25 pounds.	20-50#	10-25#	Negligible-10#
Heavy: Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	50-100#	25-50#	10-20#
Very Heavy: Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	Over 100#	Over 50#	Over 20#
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.