SENIOR FINANCIAL ANALYST – Dept of Surgery

Job Code: 440071	FLSA Status: Exempt	Mgt. Approval: T. Keeler	Date: May 2019
Department: General Surgery		HR Approval: A. King	Date: May 2019

JOB SUMMARY

The Senior Financial Analyst in the Department of Surgery is responsible for collecting, analyzing, and monitoring the department's financial data. This position will provide technical accounting, analysis and support to the Department and to other departments across the UW Health system. Key position responsibilities include financial accounting and analysis, and budget development and reporting. The Senior Financial Analyst will utilize generally accepted accounting principles (GAAP) and healthcare financial accounting and reporting standards to perform annual audit preparation and to maintain UW Health's internal systems and controls.

The Senior Financial Analyst will accumulate, review, and interpret support documentation for assigned general ledger accounts. This position will analyze journals, subsidiary ledgers, schedules and other supporting documentation for accuracy of information and reconciliation to the general ledger. The Senior Financial Analyst will complete special projects as assigned and will review and analyze departmental output and associated applications.

The Senior Financial Analyst plays a leadership role within the Finance Department, leading teams and serving as a mentor to other Financial Analysts.   The Senior Financial Analyst works closely with employees and leaders across the UW Health system.

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

MAJOR RESPONSIBILITIES

- Provide general assistance and guidance to the Finance Analyst teams:
  - o Train and help educate new staff and provide ongoing training to existing staff; answer questions regarding team functions and assist with team direction
  - o Actively mentor other colleagues by contributing experience and insight to the team and to UW Health.
  - o Manage large programs or financial processes of significant complexity and risk.
- Prepares reports, spreadsheets & schedules with compiled financial data
- Processes general ledger entries. Reviews and reconciles general ledger accounts for month and year-end reports. Prepares revenue and expense accruals to reflect financial position.
- Prepares financial statements, including but not limited to the balance sheet, income statement, cash flow statement, and profit and loss statement in addition to applicable footnotes and accompanying schedules.
- Prepares financial and statistical analyses, graphs, and presentation materials; provides analytical support for the finance team and operational partners.
- Measures actual performance against operating plans/standards and interprets the results for all levels of management; identifies areas where financial performance can be improved. Responds to all levels of management as needed for information requests as they relate to financial statements, budgets, projections, and other Accounting related areas.
- Researches and calculates the impact of operational changes to budget, financial data, financial systems, etc. and the impact of the changes to the organization.
- Oversees 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	Four (4) years of experience in accounting or finance that includes experience

UW HEALTH JOB DESCRIPTION

		with computer systems, spreadsheet and database applications, data flow, report creation, and data interpretation
	Preferred	Six (6) years of experience in accounting or finance within a healthcare setting
Licenses & Certifications	Minimum	
	Preferred	CPA
Required Skills, Knowledge, and Abilities		- 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 understand complex information. Ability to intuitively and logically gather and analyze a variety of data. - Ability to manage projects with little or no supervision - Effective organizational and time management skills with proven ability to meet deadlines

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#**

		Over 100#	Over 50#	Over 20#
	Very Heavy: Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.			
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.