

Job Description – Senior Financial Analyst

**Job Title:** Senior Financial Analyst

**Department:** Accounting/Finance

**Supervisor:** Todd Gannon

**FLSA Status:** Exempt

**Prepared By:** OT

**Prepared Date:** 9/30/16

**Approved By:** TG

**Approved Date:** 12/22/16

**Summary**

The Sr. Financial Analyst supports all reporting, analysis and financial planning efforts of the company. This position will use billing/practice management, financial and other company systems to create and run reports on operational performance and financial metrics. These reports will be used by the position to analyze the information to draw out a business recommendation. This position communicate their findings to management in a way that is concise and actionable form. The position will play a large role in the monthly revenue close process, monthly financial reporting and monthly investor presentation. They will also be heavily involved in the annual planning process, as well as the quarterly company forecast process. Ad hoc and other administrative functions may also be required to support the department on an as needed basis.

**Essential Duties and Responsibilities** include the following. Other duties may be assigned.

* Completes weekly, monthly, quarterly, annual and ad-hoc management reports and analysis:

1. Financial statement
2. Investor board deck
3. Annual operating plans
4. Quarterly forecast
5. Revenue reports
6. Ad hoc financial analysis
7. Performance metrics
8. Visit reports and analysis
9. Physician scorecards and supplemental data
10. Ancillary utilization reports
11. Department financials and GL backup
12. Reporting system maintenance
13. Field reporting ad hoc requests
14. Other miscellaneous reports as required

* Maintains all reports, data models and raw data storage in a timely and accurate manner.
* Is the go to expert regarding system data and report building
* Is the point contact for all report requests from the field and physician offices
* Works with practice manager to communicate, distribute and analyze various physician performance data
* Performs other reporting, analytical, financial or administrative tasks as may be required from time to time by the CFO or Director of Financial Planning, Analysis and Reporting

**Supervisory Responsibilities**

This job has no supervisory responsibilities.

**Competencies**

To perform the job successfully, an individual should demonstrate the following competencies:

Adaptability – Maintaining effectiveness in varying environments and with different tasks, responsibilities, and people.

Analysis/Problem Assessment – Securing relevant information and identifying key issues and relationships from a base of information; relating and comparing data from different sources; identifying cause-effect relationships.

Communication - Expressing ideas effectively in individual and group situations (including nonverbal communication); adjusting language or terminology to the characteristics and needs of the audience. Good listening skills.

Compassion - The responsibility to put a patient’s or person’s interests first, including the duty not to harm, deliver proper care, and maintain confidentiality.

Compliance - Employee has satisfactory completed employers required compliance training.

Employee is able to demonstrate an understanding of employers Code of Conduct.

Dependability - Meets commitments, deliverables, deadlines, work independently, accepts accountability, handles change, sets personal standards, stays focused under pressure, and meets attendance/punctuality requirements.

Follow-up - Establishing procedures to monitor the results of delegations, assignments, or projects; taking into consideration the skills, knowledge, and experience of the assigned individual and characteristics of the assignment or project.

Initiative - Making active attempts to influence events to achieve goals; self-starting rather than accepting passively; taking action to achieve goals beyond what is required; being proactive. Practices self-development.

Integrity - Maintaining and promoting social, ethical, and organizational norms is conducting internal and external business activities.

Judgement/ Problem Solving - Recognizes problems and responds, systematically gathers information, sorts through complex issues, seeks input from others, addresses root cause of issues, makes timely decisions, can make difficult decisions, uses consensus when possible, and communicates decisions to others.

Patient Service Orientation - Proactively developing patient/customer relations by making efforts to listen and understand the customer and their needs (both internal and external); anticipating and providing solutions to customer needs; giving high priority to patient/customer satisfaction. Ensures appropriate follow up and is their advocate in determining solutions. The employee uses a variety of communication techniques to effectively express thoughts and ideas and to understand or influence.

Practical Learning - Assimilating and applying, in a timely manner, new job-related information that may vary in complexity.

Quality Orientation/ Attention to detail - Is attentive to detail and accuracy, is committed to excellence, looks for improvements continuously, monitors quality levels, finds root cause of quality problems, owns/acts on quality problems.

Results Driven& Execution - Accountable for meeting or exceeding individual and/or department goals and objectives. Committed to producing results that will achieve company objectives. Sets priorities and organizes time to meet or exceed goals, follows up, and takes personal responsibility for results whether they are positive or negative.  
Team work/ Collaboration - Working effectively with team/work group or those outside formal line of authority (e.g., peers, senior managers) to accomplish organizational goals; taking actions that respect the needs and contributions of others; contributing to and accepting the consensus; subordinating own objectives to the objectives of the organization or team. Listens to others and values opinions.

Technological /Professional knowledge - Having achieved a satisfactory level of technical and professional skills/knowledge in job-related areas; keeping abreast of current developments and trends in area of expertise.

Work Standards - Setting high goals or standards of performance for self, direct reports, others, and the organization; being dissatisfied with average performance; self-imposing standards of excellence rather than having standards imposed by others.

**Qualifications** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Education and/or Experience**

Bachelor's degree from four-year college or university; or one to two years related experience and/or training; or equivalent combination of education and experience.

**Language Skills**

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

**Mathematical Skills**

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.

**Reasoning Ability**

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

**Computer Skills**

To perform this job successfully, an individual should have knowledge of Microsoft Spreadsheet software; Microsoft Word Processing software and Sage Accounting software.

**Certificates, Licenses, Registrations**

N/A

**Physical Demands** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms; climb or balance and talk or hear. The employee is frequently required to stand and walk. The employee is occasionally required to stoop, kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus.

**Work Environment** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate depending on business activity of the office.

**Receipt and Acknowledgement**

I acknowledge and understand that:

• Receipt of the job description does not imply nor create a promise of employment, nor an employment contract of any kind, and that my employment is at-will.

• The job description provides a general summary of the position in which I am employed, that the contents of this job description are job requirements and, at this time, I know of no limitations which would prevent me from performing these functions with or without accommodation. I further understand that it is my responsibility to inform my supervisor at any time that I am unable to perform these functions.

• Job duties, tasks, work hours and work requirements may be changed at any time.

• Acceptable job performance includes completion of the job responsibilities as well as compliance with the policies, procedures, rules and regulations of the Home and the Corporation.

• I have read and understand this job description.

Print Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_