



## **JOB DESCRIPTION**

**POSITION TITLE:** Senior Financial Analyst I

**POSITION NO:** 2283

### **JOB SUMMARY**

The Senior Financial Analyst I is responsible for collecting, analyzing and monitoring financial data. The individual will work under the direction of leadership to develop, prepare, interpret, and monitor financial analysis and prepare forecasts and analyze the company's short through long term position to be used by leadership in various decision making processes. The Senior Financial Analyst I provides financial information, serves as a knowledge resource to operations managers and makes recommendations to senior management.

### **ESSENTIAL JOB FUNCTIONS**

1. Utilizes thorough knowledge of the technical aspects of software used in the decision support, forecasting and reporting processes to enable effective use of these tools.
2. Maintains budgeting, forecasting and reporting software to make recommendations to senior level management to allow for secure financial decisions.
3. Provides software training, technical assistance, analysis and advice to managers to assist in completion of complex management reporting, forecasting, and decision support.
4. Communicates with managers to obtain operational assumptions used in completing complex budgets/forecasts for the organizations short, medium and long term position.
5. Reviews completed budgets/forecasts for reasonableness and completeness to identify errors and outliers.
6. Consolidates management reports, service line reports, and forecasts to present in organization financial statement formats and calculates financial ratios to enable comparison to requirements.
7. Provides leaders with analysis and recommendations to support operational decisions as well as gaining insight to use in preparing budgets/forecasts.
8. Develops comprehensive periodic forecasts used to make financial decisions.
9. Reviews monthly financial results and prepares explanations of variances between actual and budgets/forecasts to provide an understanding of operational changes.
10. Develops, produces and distributes reports to enhance the understanding of financial information and measure progress toward financial goals.
11. Reviews processes and implements improvements to increase efficiency.
12. Orchestrates complex financial service projects delegated by leadership to ensure design, development, and preparation are completed in a timely manner.
13. Maintains knowledge of data warehouse software to accumulate data from various programs to provide quality information efficiently.
14. Acquires thorough knowledge of the technical aspects of software used in the decision support process, forecasting, and reporting process to enable effective use of these tools.

15. Maintains working knowledge of General Accounting Principles (GAP) and reporting mechanisms to ensure proper coordination of projects.
16. Maintains a high quality of timelines and work performed to meet organizational deadlines.
17. Prepares detailed and accurate implementation and documentation to successfully bring a project to completion.
18. Mentors junior staff and peers to maintain a highly effective, knowledgeable team.
19. Regular attendance is required in order to carry out the essential functions of the position.
20. Reviews and meets ongoing competency requirements of the role to maintain the skills, knowledge and abilities to perform, within scope, role specific functions.

#### **ADDITIONAL DUTIES**

1. Other duties as assigned.

#### **JOB QUALIFICATIONS**

##### **EDUCATION**

*For positions requiring education beyond a high school diploma or equivalent, educational qualifications must be from an institution whose accreditation is recognized by the Council for Higher Education and Accreditation.*

**Minimum Required:** Bachelor's degree in accounting, finance, business administration or related field.

**Preferred/Optional:** Master's degree in accounting, finance, business administration.

##### **EXPERIENCE**

**Minimum Required:** Five years' experience in accounting, finance, or decisions support. Demonstrated proficiency with completing independent financial analysis, collaborating with managers and making sound recommendations to managers.

**Preferred/Optional:** Experience within a healthcare setting in accounting and finance. Experience using spreadsheet software, with working knowledge of functions and databases.

##### **CERTIFICATIONS/LICENSES**

*The following licensure(s), certification(s), registration(s), etc., are required for this position. Licenses with restrictions are subject to review to determine if restrictions are substantially related to the position.*

**Minimum Required:** None

**Preferred/Optional:** Certified Public Accountant (CPA) license awarded by the state of Wisconsin or Certified Healthcare Financial Professional (CHEP) certification awarded by the Healthcare Financial Management Association (HFMA).

**PATIENT POPULATIONS SERVED**

Individuals hired are expected to serve patients of different ages, backgrounds, etc. When performing the essential functions of the role, the individual must identify the patient age group to be served and apply the appropriate care based on the patient’s age and background. The hiring manager is responsible for communicating the patient population generally encountered in the role and is responsible for ensuring the appropriate cultural, age and related training needed to serve the patient populations.

Check appropriate patient age group(s) served or select “Not Applicable”						
<input type="checkbox"/> Infant	<input type="checkbox"/> Toddler	<input type="checkbox"/> Child	<input type="checkbox"/> Adolescent	<input type="checkbox"/> Adult	<input type="checkbox"/> Older Adult	<input type="checkbox"/> Not Applicable

**EXCLUSION FROM FEDERAL PROGRAMS**

Employee may not at any time have been or be excluded from participation in any federally funded program, including Medicare and Medicaid. This is a condition of employment. Employee must immediately notify his/her manager or the Clinic’s Compliance Officer if he/she is threatened with exclusion or becomes excluded from any federally funded program.

**ORGANIZATIONAL COMPETENCIES**

- Patient Centered
- Trust
- Teamwork
- Excellence
- Affordability

SPECIAL FACTORS				
Expected Travel and Shift Factors of the Role	Expected Frequency Individual Will Be Requested of Travel and Shift Factors in the Role			
	Frequently Required	Occasionally Required	Seldom Required	Unlikely
Day travel	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Overnight travel	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
On-call shifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Holiday shifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<p><i>All employees’ hours are scheduled according to the needs of the department. Occasional changes to Scheduled hours may be necessary when required by workload or departmental deadlines. May require additional hours based on workload, low staffing or emergency situations.</i></p>				

<b>PHYSICAL DEMANDS</b>					
<b>Expected Physical Demands of the Role</b>	<b>Expected Frequency Individual Will Perform the Physical Demands in the Role</b>				
	<b>Continuously (67 – 100%)</b> <i>Greater than 5 hours of 8 hour work day</i>	<b>Frequently (34 – 66%)</b> <i>2 ½ to 5 hours of 8 hour work day</i>	<b>Occasionally (11 – 33%)</b> <i>50 minutes to 2 ½ hours of 8 hour work day</i>	<b>Seldom (0 – 10%)</b> <i>Less than 50 minutes of 8 hour work day</i>	<b>Not Present</b>
Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Climb	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Grasp	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kneel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lift and carry 10 pounds or less for a short distance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lift and carry less than 35 pounds for a short distance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lift greater than 35 pounds utilizing mechanical systems or with additional personnel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pivot waist and neck	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push and pull 50 pounds or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Push and pull greater than 50 pounds utilizing mechanical systems or with additional personnel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reach less than 5 feet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reach higher than 5 feet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sit with back support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sit without back support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Squat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stand Unsupported	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wrist flexion/extension	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>All employees are required to utilize proper body mechanics, lifting and moving techniques and/or request assistance from additional staff before attempting to lift any weight outside of their physical capabilities and/or provider ordered restrictions. Actual weight(s) of individuals or items to be lifted vary substantially and must be carefully assessed by staff before attempting a lift to minimize the risk of employee injuries and ensure patient safety.</i>					
<b>Hearing and Vision</b>			<b>Requirement</b>	<b>Not a Requirement</b>	
Normal vision with/without correction			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Color vision			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Normal hearing with/without correction			<input checked="" type="checkbox"/>	<input type="checkbox"/>	

<b>ENVIRONMENTAL FACTORS</b>					
<b>Expected Environmental Factors of the Role</b>	<b>Expected Frequency Individual Will Be Exposed to Environmental Factors Demands in the Role</b>				
	<b>Continuously (67 – 100%) <i>Greater than 5 hours of 8 hour work day</i></b>	<b>Frequently (34 – 66%) <i>2 ½ to 5 hours of 8 hour work day</i></b>	<b>Occasionally (11 – 33%) <i>50 minutes to 2 ½ hours of 8 hour work day</i></b>	<b>Seldom (0 – 10%) <i>Less than 50 minutes of 8 hour work day</i></b>	<b>Not Present</b>
Works indoors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works outdoors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Uses a computer monitor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works alone	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works with others	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works at unprotected heights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Works with explosives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to biological agents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to dust, fumes, smoke, gases, odors, mists or other irritating particles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to excessive noises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to extreme hot or cold temperature and/or changes in humidity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to radiation or electrical energy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to slippery or uneven walking surfaces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to solvents, grease or oils	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to toxic or caustic chemicals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Exposure to vibration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Around moving machinery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Operates moving machinery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other special conditions:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

*All employees are required to appropriately dress is based on the area the position resides in and must follow the Marshfield Clinic Health System Personal Appearance (Dress Code) policy and other applicable departmental policies.*

The above statements are intended to describe the general nature and level of work being performed by the person assigned to this position. Essential job functions are intended to describe those functions that are essential to the performance of this job, and additional job functions include those that are considered incidental or secondary to the overall purpose of this job.

This job description does not state or imply that the above are the only duties and responsibilities assigned to this position. Employees holding this position will be required to perform any other job-related duties as requested by management. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

**CREATED BY:** Director of Finance/Market Chief Financial Officer & Director of Financial Planning & Analysis-MCHS

**DATE MODIFIED:** 8/30/2018