

## Position Description

Employment Agreement:	Individual Employment Agreement
Position Title:	<b>Assistant Financial Accountant</b>
Service & Directorate:	Finance
Location:	Dunedin
Reports to:	Financial Accountant
DHB Delegation Level:	N/A
Number of direct reports:	Nil
Date:	August 2021

### Our Vision

Better Health, Better Lives, Whānau Ora

We work in partnership with people and communities to achieve their optimum health and wellbeing  
We seek excellence through a culture of learning, enquiry, service and caring

### Our Shared Values and Behaviours

Kind <i>Manaakitanga</i>	Open <i>Pono</i>	Positive <i>Whaiwhakaaro</i>	Community <i>Whanaungatanga</i>
<b>Looking after our people:</b> We respect and support each other. Our hospitality and kindness foster better care.	<b>Being sincere:</b> We listen, hear and communicate openly and honestly. We treat people how they would like to be treated.	<b>Best action:</b> We are thoughtful, bring a positive attitude and are always looking to do things better.	<b>As family:</b> We are genuine, nurture and maintain relationships to promote and build on all the strengths in our community.

### Our statutory purpose

To improve, promote and protect the health of our population

- Promote the integration of health services across primary and secondary care services
- Seek the optimum arrangement for the most effective and efficient delivery of health services
- Promote effective care or support for those in need of personal health or disability support services
- Promote the inclusion and participation in society and the independence of people with disabilities
- Reduce health disparities by improving health outcomes for Māori and other population groups
- Foster community participation in health improvement and in planning for the provision of and changes to the provision of services
- Uphold the ethical and quality standards expected of use and to exhibit a sense of social and environmental responsibility

PURPOSE OF ROLE
<p>Responsibility for contributing to the monthly financial statement preparation and reporting.</p> <p>Participating in the Annual report preparation and audit process.</p> <p>Providing support for projects as required.</p> <p>Identifying and implementing efficiencies within the Finance team and the wider DHB.</p> <p>Supporting change when required by Statutory requirements.</p> <p>Provide cover for a variety of financial services roles including but not limited to Accounting Technician roles, other Assistant Financial Accountant roles and Business Analysts roles.</p>

## Competencies

The following competencies apply to this position. The employee will be assessed against these as part of their annual performance and development review.

Organisational Competencies	
<b>Customer Focus</b>	Is dedicated to meeting the expectations and requirements of internal and external customers; gets firsthand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect
<b>Integrity and Trust</b>	Is widely trusted; is seen as a direct, truthful individual; can present the unvarnished truth in an appropriate and helpful manner; keeps confidences; admits mistakes; doesn't misrepresent him/herself for personal gain.
<b>Drive For Results</b>	Can be counted on to exceed goals successfully; Is constantly and consistently one of the top performers; very bottom line oriented; steadfastly pushes self and others for results.
Role Specific Competencies	
<b>Process Management</b>	Skilled at figuring out the processes necessary to get things done; understands how to organise people and activities; recognises how to separate and combine tasks to produce an effective workflow; is able to identify what to measure and how to measure it; can see opportunities for collaboration and integration where others can't; can streamline complex processes; is resourceful.
<b>Informing</b>	Provides the information people need to know to perform their jobs proficiently and to feel good about being a member of the team, unit, and/or the organisation; provides individuals information so that they can make accurate decisions; produces appropriate timely information.
<b>Problem Solving</b>	Uses rigorous logic and methods to solve difficult problems with effective solutions; probes all productive sources for answers; can see hidden problems; is excellent at honest and reliable analysis; looks beyond the obvious and doesn't stop at the first answers

KEY RELATIONSHIPS	
Internal	External
<ul style="list-style-type: none"> <li>Te Whatu Ora Health New Zealand staff</li> </ul>	<ul style="list-style-type: none"> <li>Ministry of Health and other Government departments</li> </ul>
<ul style="list-style-type: none"> <li>Finance department</li> </ul>	<ul style="list-style-type: none"> <li>Patients and customers</li> </ul>

## PERSON SPECIFICATION

The expertise required for a person to be fully competent in the role. Position specific competencies:

	ESSENTIAL	DESIRABLE
<b>Education and Qualifications (or equivalent level of learning)</b>	<ul style="list-style-type: none"> <li>Commerce degree or other equivalent</li> <li>Member Chartered Accountants Australia &amp; New Zealand; ACA, CA qualified or progressing toward CA.</li> </ul>	
<b>Experience</b>	<ul style="list-style-type: none"> <li>2-3yrs Accounting experience (Financial or Management)</li> <li>Working with accounting systems</li> <li>Systems based approach to problem solving and processes</li> </ul>	
<b>Knowledge and Skills</b>	<ul style="list-style-type: none"> <li>Computer literate</li> <li>Advanced MS Excel skills</li> <li>Demonstrable skills with Microsoft suite</li> <li>Has a strong analytical ability and attention to detail</li> </ul>	<ul style="list-style-type: none"> <li>Oracle application experience</li> </ul>
<b>Personal Qualities</b>	<ul style="list-style-type: none"> <li>Be innovative and self-motivated</li> <li>Have a desire to succeed and grow personally as well as part of a team</li> <li>Ability to be goal orientated and customer focused</li> <li>Ability to deal with people and work as part of a busy team</li> <li>Ability to teach appropriate skills to other team members as required</li> <li>Ability to organise an effective work schedule</li> <li>High levels of honesty, integrity and confidentiality</li> </ul>	

### KEY RESULT AREAS:

Key Accountabilities:	Example of successful delivery of duties and responsibilities
<b>Financial Statement Preparation &amp; Reporting</b>	
Contribute as an active team member within the finance team to support the functions of the Southern DHB.	
<ul style="list-style-type: none"> <li>Assists monthly accounts preparation, reporting, analysis</li> <li>Prepare IRD returns as required.</li> <li>Assists with Ministry of Health template reporting</li> <li>General Ledger (GL) journal processing and accruals</li> <li>Provides an internal audit function as required both within and outside the finance team</li> <li>Reviews processes periodically to find improvements and more cost-effective methods</li> <li>Assists with the review of finance related processes, policies and manuals</li> <li>Ensuring any processing meets delegation policies and limits</li> <li>Provides back-up and training for other team members</li> </ul>	<ul style="list-style-type: none"> <li>Efficient transaction processing and reporting</li> <li>Accuracy of returns</li> <li>Adherence to work practice in line with organisational and finance policies</li> <li>Team participation and cross cover for other finance roles</li> <li>All policies and manuals updated as required</li> <li>All processes documented for training purposes</li> <li>Implement training and support for other staff</li> <li>Positive feedback from suppliers and clients</li> </ul>

<p><b>General Accounting Support</b></p> <p>Ability to undertake a variety of finance roles including transactional and analytical.</p>	
<ul style="list-style-type: none"> <li>• Knowledge of all Accounting functions (e.g. Fixed Assets, taxes, reconciliations)</li> <li>• Ability to support analytical requirements of the DHB by providing resource for variance analysis, cost-benefit analysis etc</li> <li>• Business cases and projects as required.</li> </ul>	<ul style="list-style-type: none"> <li>• Detailed analysis / Report writing</li> <li>• Accurate spreadsheet presentation</li> <li>• Is adept at communicating complex accounting issues to non-accountants</li> </ul>
<p><b>Team Performance and Development</b></p> <p>Participation in a team environment in which the Southern DHB objectives and plans can be achieved and performance enhanced.</p>	
<ul style="list-style-type: none"> <li>• Support the philosophy and values of the Board missions and values among all employees</li> <li>• Foster and support commitment to achieving the highest level of health and safety, including identification and reporting of all hazards, assistance in resolving issues that may cause harm to staff, and working safely at all times</li> <li>• Participate in organisational training and development programmes</li> <li>• Continue personal development by identifying and engaging in formal and information personal development opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Attendance at compulsory training sessions, fire training etc</li> <li>• Participation in performance and development reviews</li> </ul>
<p><b>Policies and Quality Assurance</b></p> <p>Adherence and participation with DHB policies and work procedures. Participation in the DHBs quality frameworks for certification and accreditation purposes</p>	
<ul style="list-style-type: none"> <li>• Actively participate in continuous quality improvement as per Standards, Policies and Procedures within the Health Board</li> <li>• Report any unusual incidents or occurrences, especially those which may give rise to complaints or legal action against the DHB</li> <li>• Observe and practice safe work methods using safety equipment where it is provided, and report unsafe working conditions or equipment to management as necessary</li> <li>• Communicate organisation mission, values and objectives to all groups</li> <li>• Be familiar with and responsive to the Treaty of Waitangi, and give effect to the principles of the Treaty – partnership, participation and protection</li> </ul>	<ul style="list-style-type: none"> <li>• Evidence of work practice manuals or documentation</li> <li>• Participation in any risk, quality or legislative frameworks and initiatives</li> </ul>
<p><b>Other Duties</b></p>	
<p>Undertaking duties from time to time that may be in addition to those outlined above but which fall within your capabilities and experience.</p> <p>Act as a role model for the Southern DHB Organisational Values.</p>	<ul style="list-style-type: none"> <li>• You respond positively to requests for assistance in own and other areas, demonstrating adaptability and willingness.</li> <li>• You produce work that complies with SDHB processes and reflects best practice.</li> <li>• Research undertaken is robust and well considered.</li> <li>• Live and support the DHB values in everything you do.</li> </ul>

Professional Development – self	
Identifying areas for personal and professional development.	<ul style="list-style-type: none"> <li>• Training and development goals are identified/agreed with your manager.</li> <li>• Performance objectives reviewed annually with your manager.</li> <li>• You actively seek feedback and accept constructive criticism.</li> </ul>
Health, Safety and Wellbeing	
Taking all practicable steps to ensure personal safety and the safety of others while at work, in accordance with the Southern DHB’s Health, Safety and Wellbeing policies, procedures and systems.	<ul style="list-style-type: none"> <li>• You understand and consistently meet your obligations under Southern DHB’s Health and Safety policy/procedures.</li> <li>• You actively encourage and challenge your peers to work in a safe manner.</li> <li>• Effort is made to strive for best practice in Health and Safety at all times.</li> </ul>
Treaty of Waitangi	
Giving effect to the principles of the Treaty of Waitangi – Partnership, Participation and Protection through your interaction with others on a day to day basis.	<ul style="list-style-type: none"> <li>• <i>Partnership</i> – You interact in good faith and in the nature of a partnership. There is a sense of shared enterprise and mutual benefit where each partner takes account of the needs and interests of the other.</li> <li>• <i>Participation</i> – You work in partnership with our treaty partners to enable our organisation to prosper. You are mindful of the varying socio-economic conditions that face our people and work hard to remove barriers of access to health and education.</li> <li>• <i>Protection</i> – You work proactively to protect the rights and interests of Māori, including the need to proactively build the capacity and capability of Māori.</li> </ul>

Note: the above example measures are provided as a guide only. The precise performance measures for this position will require further discussion between the job holder and manager.

### CHANGES TO POSITION DESCRIPTION

From time to time it may be necessary to consider changes to the position description in response to the changing nature of our work environment – including technological requirements or statutory changes. This Position Description may be reviewed as part of the preparation for your annual performance and development review.

Acknowledged / Accepted:

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Employee

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Date

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Manager

.....  
Date