

Job Description

Job Title:	Finance Manager
Department:	Campus Wellness
Reports To:	Administrative Officer
Jobs Reporting:	Finance Coordinator(s)
Salary Grade:	USG 9
Effective Date:	May 2022

Primary Purpose

The Campus Wellness Administration team serves the University of Waterloo community by supporting all units within Campus Wellness (Health Services, Counselling Services and Health Promotion) with effective, efficient, collaborative, and client-focused administrative service.

The Finance Manager leads the Campus Wellness finance team, and is accountable to the Administrative Officer, Campus Wellness to ensure effective day-to-day operations of all budgeting and accounting functions. This position is regarded as one of the senior staff positions in Campus Wellness administration; the Finance Manager participates as a member of the Administrative Management Team.

Key Accountabilities

Clinical Accounting

- Responsible for overseeing all OHIP and non-OHIP billings and related reports.
- Generate and submit weekly UHIP billings to insurance company.
- Reconcile OHIP and non-OHIP billings to Unit4.
- Generate and disseminate monthly overhead statements for independent contractors.
- Calculate independent contractor's overhead with multi-faceted percent structures, considering the contractual obligations outlined in each Memorandum of Agreement and variations according to type of service provided (mental health appointments, verification of illness forms and evening hours).
- Deduct overhead from payments owing to independent contractors for providing medical services.
- Prepare Memoranda of Agreements (MoAs) for new independent contractors and renew expiring MoAs.
- Mitigate risk by ensuring current licensing and insurance documentation is kept on file for all independent contractors.

Financial Administration and Budget Oversight

- Provide financial oversight for Campus Wellness expenses by adhering to financial best practices and University of Waterloo financial policies and guidelines; collaborate with Financial Officer, AP Students, where appropriate.
- Provide insight and analysis of budget status within and alerts appropriate manager of potential budget challenges/concerns.
- Prepare the annual operating budget for Campus Wellness by analyzing previous years' revenues and expenditures; preparing budget templates and draft budgets for managers' review; moving budget funds where appropriate to support Campus Wellness activities; and prepare final roll-up and balancing of Campus Wellness ORGs for the Director, Campus Wellness' approval.
- Manage Campus Wellness risk by continuously evaluating and documenting financial procedures related to all Campus Wellness business workflow.

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- Take initiative and provide leadership for appropriate organizational and procedural changes and administrative processes, including Campus Wellness-wide communication and reminders as needed.
- Review and reconcile operating budget and non-salary accounts and deals with discrepancies or errors, ensuring accuracy of all financial transactions.
- Responsible for internal transfer requests and external invoicing.
- Review personal reimbursements requests (Concur and requests for payment) to ensure accuracy, compliance, eligibility and appropriate account coding.
- Review Purchasing card expenses on a monthly basis and serve as internal support for new P-card holders; advise staff on usage, training, record-keeping practices etc.
- Conduct periodic audit and review of cash handling and point of sale procedures throughout the department to ensure financial accountability.
- Collaborate closely with all Campus Wellness staff members to ensure seamless and client-focused service to all stakeholders.

Training and Development

- Communicate financial information such as changes to policies, guidelines and procedures to staff and ensures that all staff adhere to required policies and procedures.
- Provide training to staff engaged in financial activities. Includes, but is not limited to PCard, travel and personal reimbursement (Concur, Unit4, etc.).
- Periodically review and audit department financial procedures and transactions for compliance and to identify opportunities for improvement.
- Train, coach and develop finance staff on financial and budgetary issues to help team members achieve their individual professional goals.
- Collaborate with EHR Coordinator and Health Information Coordinator to ensure relevant privacy protocols and legislation are adhered to; ensure privacy/confidentiality of patient/client information associated with Finance team through variety of systems, processes, and reports.

Staff Leadership

- Recruit, hire, supervise and manage the performance of the Finance team members.
- Oversee the day-to-day performance and professional development of the finance admin staff including conducting annual performance appraisals and performance managing as required.
- Promote and maintain positive working relationships with all stakeholders, encourage collaboration and maintaining high staff morale throughout the team.
- Foster a collaborative environment and ensure reports work proactively to provide a high level of customer service to faculty, staff, students and all customer of Campus Wellness.
- Train, coach and develop administrative staff on financial and budgetary issues to help team members achieve their individual professional goals.

**All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

Required Qualifications

Education

- Post-secondary education required in Business Administration/Finance/Accounting, preferably in a healthcare setting, diploma in Health Administration, or equivalent experience
- Progression towards an accounting designation an asset

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- At least five years of management experience in a finance setting required
- Previous experience managing staff and supporting financial activities in the healthcare field required (preferably in a post-secondary setting)
- Previous experience with medical billings for OHIP and third-party insurers
- Extensive experience working with electronic health record systems is required

Knowledge/Skills/Abilities

- Strong interpersonal skills with a proven ability to collaborate with, influence and motivate others, to promote, justify, settle and respond to highly sensitive matters pertaining to clinic operation.
- Sound judgement, attention to detail and the ability to perform in a fast-paced and varied environment are necessary in this role.
- Comprehensive understanding of the health records system and the health care environment in a clinical setting: e.g. OHIP codes UHIP codes, Ministry of Health regulations
- Electronic health records system (Accuro preferred) – extensive knowledge, understanding of procedure and diagnostic codes and their inter-relationship
- Advanced computer literacy utilizing the following systems is preferred: Concur, Unit4, Workday.
- Intermediate computer literacy with Microsoft Office (Outlook, Word, Excel)
- Demonstrated ability to prioritize and manage high-volume assignments accurately and efficiently with keen attention to detail
- Strong interpersonal skills to communicate with all administrative and clinical staff in Campus Wellness
- Ability to manage difficult people
- Ability to make time sensitive judgement calls

Nature and Scope

- **Contacts:** Internal to Campus Wellness: Communicates with administrative and clinical staff in all groups in all Campus Wellness venues. Internal on campus: collaborates with campus resource groups (e.g. Finance, Central Stores, Plant Operations). External off campus: This position will have contacts with administrative counterparts at other universities, relevant community partners, professional associations and regulators to ensure consistent and compliant client care.
- **Level of Responsibility:** Has specialized work with minimal supervision and provides guidance to others. Sound understanding of policies related to financial management, university policies and guidelines is required. Must have a high level of attention to detail. A high degree of integrity, tact, and diplomacy are required. The job will require independent thought and judgement in areas of time management, planning, problem solving and decision making.
- **Decision-Making Authority:** The Finance Manager has final decision-making authority for all areas described above and is fully accountable for decisions within the Wellness Finance Team, including hiring decisions and performance evaluations. This individual uses sound judgement to determine when and how to escalate issues to the Administrative Officer or elsewhere within Campus Wellness. The Finance Manager engages others to collaboratively solve systemic problems ranging from lack of compliance with department policy or procedure to optimize department processes or systems. Solutions to such problems can include development of new systems, acquisition of software or hardware, process or systems changes that affect the department, clients, staff, and clinicians. Problems are often complex and require balancing competing priorities and competing needs of stakeholders.
- **Physical and Sensory Demands:** Possibility for multiple interruptions and competing priorities on a daily basis. Flexibility and responsiveness to a variety of administrative and clinical staff regarding day-to-day and long-term issues are required. Requires extended periods of sitting and concentrated use of visual senses, primarily on screen.

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- **Working Environment:** Risk of exposure includes: airborne and contact-based illnesses; risk of exposure to occasional challenging and complex situations, including sensitive client/staff interactions typical of a senior staff position at this level. Located indoors in a comfortable, fast-paced office environment populated by clinical, administrative staff, as well as clients (University of Waterloo students, staff, faculty, and student family members). There may be unusual hours or schedules, multiple and/or tight deadlines beyond one's control and frequent interruptions (e.g. phone calls, e-mails, unplanned but urgent support requests, varying student volumes at different times of year). At times, Campus Wellness hours of operation can include from 8:00 a.m. to 8:00 p.m. Position requires flexibility to occasionally shift working hours to include evenings.