

Finance Assistant

Responsible to: Senior Finance Manager

Responsible for: N/A

Grade: 4

Purpose of the post

- To provide financial and administrative support as a member of the Finance Service Team.

Responsibilities

- Handles budgetary enquiries and resolves problems/anomalies as they occur with consideration for the financial position of the schools.
- Assists the Finance Manager and Senior Finance manager in setting up systems to monitor school spending, using the ledger system, University databases and Microsoft Excel.
- Liaises with budget holders as necessary to control spending and maintain accurate accounting records.
- Checks and approves Associate Staff Tutor payroll payments
- Assists the Finance Manager in the preparation of various financial reports for internal and external customers.
- Is responsible for the cross charging of workshops and services to users in accordance with University practice.
- Prepares and updates relevant financial documentation as required.
- Raises invoices and liaises with external customers and suppliers as required.
- Monitors, co-ordinates and maintains a record on school spending on research grants.
- Checks and pays invoices.
- Works closely with other financial units within the University on a range of University or inter-school issues.
- Has other duties consistent with the grade of the post as determined by the Senior Finance Manager.

This Job Description sets out current duties of the post that may vary from time to time without changing the general character of the post or the level of responsibility entailed.

HERA Role Description

Other posts considered similar in terms of tasks/responsibility (if applicable):

1. Communication

Please give details of the oral communication that is required of the post-holder, including frequency and level of complexity, and give examples:

Responding to basic financial questions from academics/support staff on a daily basis and external companies on an ad hoc basis. For example queries regarding recharges, income/expenditure on codes, explaining financial procedures

Collecting and entering recharges on a monthly basis. Approving the AT payments system on a monthly basis. Both require contact with person supplying the information.

Please give details of the written communication that is required of the post-holder, including frequency and level of complexity, and give examples:

Internal / External letters and e-mails e.g. drafting letters to informing holders of devolved code budgets of their balances, for Finance Manager to sign off.

Helps the Finance Manager prepare materials for training presentations

2. Teamwork and Motivation

Please give details of the team in which the role-holder works, and their level within it. Do they have supervisory or full line-management responsibilities? If so, how may people report to them, directly or indirectly?

Works in team with Finance Manager and Senior Finance Manager and may offer mutual support when workload is heavy or a deadline is tight.

3. Liaison and Networking

Please give details of who the role-holder will be required to liaise with. Are they required to participate in and/or initiate or lead networks, either internally or externally?

Day to day liaison with academics & support staff.

4. Service Delivery

Is the role-holder required to deliver a service? Is this service mainly reactive or proactive in nature? Please give details:

The School finance office offers an administration & budgeting service to its academic and administrative customers regarding electronic purchasing and stores in particular. Usually

proactive as for budget reporting on a monthly basis, but can be reactive if responding to a query from a colleague.

5. Decision Making Processes and Outcomes

Is the role-holder required to make independent, collaborative and/or advisory decisions in their role? If so please give examples and the level of impact of these decisions.

Monitoring of overspends on devolved accounts and contacting the appropriate individual to recommend corrective action.

Making decisions to change working procedures

Identifying weaknesses in invoice processing

6. Planning and Organising Resources

Please give details of any planning or organising that is required in this role. Does the role-holder have responsibility for planning their own tasks, and/or those of others? Do they plan or manage specific projects, or engage in longer-term planning? Please give examples.

Working on a monthly plan from diary – monthly expenditure file, devolved codes, breakdown of recharges, income codes and Associate Tutors

Quarterly – Commitment check on ePO orders

Yearly – Stockchecks for ePO and accruals

Deciding when and how to respond to requests for information

7. Initiative and Problem-Solving

Please give details of any problem-solving that the role-holder is required to undertake and the level of complexity. Please also give details of any initiative or creativity that the role-holder is required to undertake in their role.

Respond to EPO problems, look into why orders wont close

Identify the reason for unexpected changes to salary commitments

Investigate queries from academics regarding the stores system

Run reports on Sussex Direct for the Finance Manager, deciding what information is appropriate and presenting in the best format

8. Analysis and Research (not necessarily academic analysis/research)

Is the role-holder required to analyse or interpret information or data? Are they required to investigate or research information? Please give examples:

Analysing data from monthly income/expenditure reports and identifying anomalies.

9. Sensory and Physical Demands

Is the role-holder required to carry out tasks requiring physical effort or a mastery of a range of sensory or physical techniques? If so, please give details:

Inputting complex data for more than 50% of working day.

Inputting journals for recharges

10. Work Environment

Please give details of the individual's work environment. Do they have any responsibility for the health and safety of others?

The use of display screen equipment according to health and safety guidelines.

Working in a stable office environment.

11. Pastoral Care and Welfare

Is the role-holder required to deal with the welfare issues of others? Are they responsible for dealing with performance and disciplinary issues?

Academics who have overspent their devolved accounts can get very anxious. Provides guidance. Occasional guidance to students

12. Team Development

Is the role-holder responsible for helping to induct new starters, or provide training or instruction to other members of the team, or to identify training needs? Please give details.

Provides new academics with appropriate coding lists

13. Teaching and Learning Support

Is the role-holder required to give simple explanations/demonstrations, or short one-off training sessions or lectures? Please give examples:

N/A

14. Knowledge and Experience

Please give details of any specialist or technical knowledge or academic/professional qualifications that are required of this role:

Understands spreadsheets and is numerate

Requires good understanding of procedures - provides advice to others about how procedures should be applied.