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| **Job Description** |
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| **Cambridgeshire and Peterborough CCG** **Accounts Assistant**  |
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| **Job Title** | **Accounts Assistant** |
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| **Band** | **Agenda for Change Band 2** |
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| **Directorate** | **Finance** |
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| **Base Location** | **Home based****Ability to travel to other sites and to CCG offices is required.** |
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| **Worker Status** | **Office based** |
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| **Hours** | **Full time (37.5 hours)** |
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| **Accountable to** | **Head of Finance – Community, Mental Health and Continuing Healthcare** |
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| **Responsible to** | **Head of Finance – Community, Mental Health and Continuing Healthcare** |
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| **Key Working Relationships** | **Finance colleagues; wider CCG dictorates and colleagues**  |
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| **General Information** |

**Vision**
Cambridgeshire and Peterborough CCG will work in partnership to improve quality of

care, to develop healthy communities through change and innovation, making wise decisions about how we use the resources available to us.

**Our Values**

We are committed to being;

* Organised
* Honest
* Decisive
* Innovative
* Ambitious
* Compassionate

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| **Job Purpose** |
| The post will report to line managers and senior management to support the provision of a range of financial services, management and planning support to the CCG.The post holder will ensure financial information is processed in accordance with procedures and in order to provide concise information for statutory and local returns and reports.The post holder will investigate financial enquiries, providing assistance and advice as required. |

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| **Key Duties and Responsibilities** |

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| **Personal Health Budget*** Account management and monitoring duties for patients holding PHBs
* Raising monthly payments for PHB holders and ensuring the monies are received into their account for the 1st of the month
* Liaise with patients and managed account operators directly to file reviews on their monthly/quarterly activity; ensuring their monthly spend is within budget and follows suit to their support plan
* Insight into how healthcare is personalised for individual and how each will have their needs met differently
* Work with members from other team such as Admin and Complex cases to gain a wider insight into individual case management, ensuring all prior steps are taken to ensure patient care needs are met successfully
* Monitor PHB holder’s accounts for surplus monies and stop and start payments appropriately to ensure accounts don’t go into excess
* Ensure any queries within the accounts are raised with CHC team and investigated appropriately

**Communication:** * The post holder will be required to work actively with a range of other professionals within the organisation and within external bodies, including:
* CCG and Managers and staff (clinical and non-clinical)
* Internal and External Auditors
* External Service Providers (e.g. SBS and Serco)
* NHS England and Local Representatives
* All other finance team members
* The post holder will be required to exercise sensitivity and empathy when communicating with patients and/or their families regarding highly sensitive issues.

**Human Resources:*** Maintain own professional development and requirement to take part in appraisal and KSF process.

**Governance*** Observe and maintain strict confidentiality with regards to any patient/family/staff/records and information in line with the requirements of the Data Protection Act.
* Any data that is taken/shared as part of a phone call or transported, faxed or transferred electronically must be undertaken with regard to C&P CCG Information Governance and Information Security policies.
* The post-holder must adhere to C&P CCG risk assessment and risk management processes.
* Undertake mandatory training and any other training relevant to the role as required by C&P CCG.
* The post-holder must participate in clinical and other audits as required.
* The post-holder is required to participate in relevant emergency preparedness process for their team.

**General:**The post holder must at all times carry out his/her duties with regard to C&P CCG’s Equal Opportunities Policy. To ensure that equality is everyone’s business through increased focus on equality in health outcomes and workforce diversity. To transform and embed the culture to be equality friendly.Any other duties may, from time to time, be required to be carried out by the Accounts Assistant.To be aware of the responsibilities of all employees to maintain a safe and healthy environment for patients, visitors and staff.All post holders must adhere to the code of conduct on confidentiality and be aware of and adhere to all C&P CCG policies and procedures.This job description is intended only as a guide to the range of duties involved. The post holder will need to be flexible and adaptable in order to respond to other duties that may be required from time to time and the changes and developments within C&P CCG. |

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| **Relevant to all CCG Staff**  |
| * All employees must comply with the Single Equality Scheme and must not discriminate on the grounds of sex, colour, race, ethnic or national origins, marital status, age, disability, sexual orientation or religious belief.
* Cambridgeshire & Peterborough CCG is committed to safeguarding and promoting the welfare of children, young people and adults who are at risk of neglect or abuse and expects all staff and volunteers to share this commitment.
* Employees have a responsibility to themselves and others in relation to managing risk, health and safety and will be required to work within the policies and procedures laid down by Cambridgeshire and Peterborough CCG. All staff have a responsibility to access occupational health, other staff support services and/or any relevant others in times of need and advice.
* All employees are subject to the Data Protection and Freedom of Information Acts and must maintain strict confidentiality of information in accordance with Cambridgeshire and Peterborough CCG policy and, where applicable, with the relevant policy of their professional body. The post holder may access information only on a need to know basis in the direct discharge of duties and divulge information only in the context of calculated Data Protection Guidelines.
* Any data that is taken/shared as part of a phone call or transported, faxed or transferred electronically must be undertaken with regard to C&P CCG Information Governance and Information Security policies.
* Maintain own professional development and take part in annual performance appraisal process.
* Undertake mandatory training and any other training relevant to the role as required by C&P CCG.
* The post holder is required to participate in relevant emergency preparedness processes for their team.
* Cambridgeshire and Peterborough CCG seek to establish a safe and healthy working environment for its employees and operate a non-smoking policy.
* All of the above activities are governed by the operational policies, standing financial instructions, policies and procedures and standards of Cambridgeshire and Peterborough CCG, as well as legislation and professional standards and guidelines.
* The post holder must participate in clinical and other audits as required.
* The job description and person specification are an outline of the tasks, responsibilities and outcomes required of the role. The job holder will carry out any other duties as may reasonably be required by their Line Manager.
* This is a description of the job as it is at present constituted. It is the practice of Cambridgeshire and Peterborough CCG to regularly examine employees’ job descriptions and to update them to ensure they relate to the job as then being performed, or to incorporate whatever changes are being proposed. This procedure is jointly conducted by each manager and those working directly to him or her. You will, therefore, be expected to participate fully in such discussions and, in connection with them, to re-write your job description to bring it up to date if this is considered necessary or desirable. The aim is to reach agreement on reasonable changes, but if agreement is not possible Cambridgeshire and Peterborough CCG reserves the right to insist on changes to your job description after consultation with you.
* All organisations have a legal duty to check employees’ documentation to ensure they are entitled to work in the UK and failure to conduct appropriate checks can result in criminal prosecution and/or a fine of up to £10,000 for each illegal worker.  Therefore Cambridgeshire and Peterborough CCG’s Counter Fraud Provider, TIAA will be undertaking checks on all new starters using ID scanning equipment to ensure that the identity documentation that has been provided by prospective employees is genuine.
* All new employees to Cambridgeshire & Peterborough CCG are subject to the completion of a three month probation period. In line with the Agenda for Change NHS Terms and Conditions of Service, all terms and conditions of employment will have continuous service from the first day of employment at the start of the probationary period, not from the end of the probationary period.
* An essential component of the CCG is to ensure that all staff comply with the governance requirements of CCG’s policies and procedures in place to ensure full compliance across the organisation.  Staff should make themselves aware of and comply with all relevant policies, including:

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**CCG Constitution**

* Standards of Business Conduct and Managing Conflicts of Interest
* Standing Financial Instructions (embodied within the CCG Constitution)
* Standards of Business Conduct and Commercial Sponsorship Policy
* Raising Issues of Serious Concern at Work (Whistleblowing) Policy and Procedure
* Counter Fraud Policy
* Anti-Bribery Policy

The above list is not exhaustive and may be varied by the CCG as required