

Contents

Profile Label	AfC Banding	Page
Finance Assistant (Higher Level)	2	2
Finance Officer	3	3 – 4
Finance Officer (Higher Level)	4	5 – 6
Finance Team Leader	4	7
Finance Analyst	5	8 – 9
Finance Team Manager	5	10 – 11
Finance Analyst, Specialist	6	12 – 13
Finance Section Manager	6	14 – 15
Finance Analyst, Advanced	7	16 – 17
Finance Department Manager	7	18 – 19
Principal Finance Manager	8A	20 – 21
Chief Finance Manager	8B –8D	22 – 23

National profiles for Finance

Profile Label: **Finance Assistant (Higher Level)**

- Job Statement:
1. Inputs and processes financial information, completing routine financial transactions in accordance with procedures.
 2. Responds to routine enquiries from staff/customers and suppliers and investigates queries as required.
 3. May advise patients/clients regarding e.g. charges

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive routine information to inform work colleagues, patients, clients Provides information to manager and colleagues (orally and electronically) as required and answers routine queries from staff/customers and suppliers.	2
2. Knowledge, Training & Experience	Range of routine work procedures requiring job training Knowledge of finance department procedures e.g. inputting data into finance systems, providing standard reports acquired through NVQ level 2/Association of Accounting Technicians (AAT) Foundation Level, European Computer Driving License (ECDL) or equivalent experience.	2
3. Analytical & Judgemental Skills	Judgements involving facts or situations, some requiring analysis Analyses and interprets financial payments/receipts. Investigates financial queries and analyses detailed data to identify errors/discrepancies. Carries out detailed financial calculations.	2
4. Planning & Organisational Skills	Plan and organise own day to day/straightforward tasks, some ongoing. Plans own day to day work/schedules work to meet weekly, monthly, quarterly and annual financial timetables.	1-2
5. Physical Skills	Physical skills obtained through practice/ developed physical skills; advanced keyboard use Standard keyboard skills/inputs financial data into computer databases and spreadsheets where accuracy and speed are necessary	2-3a
6. Responsibility for Patient/Client Care	Assist patients/ clients during incidental contacts /provide non-clinical advice, information to patients/ clients/ relatives Contact with patients is incidental/advises patients and clients e.g. regarding charges, property.	1-2
7. Responsibility for Policy/Service Development	Follow policies in own role, may be required to comment Follows guidelines and may be required to comment on improvements and changes.	1
8. Responsibility for Financial & Physical Resources	Handle cash, valuables Responsible for petty cash float, prepares cash for manual payments, handles patient property and travel expenses, collates financial documents, collects cash/cheques etc. from other sources	2a
9. Responsibility for Human Resources	Demonstrate own activities to new or less experienced employees Demonstrates own tasks to new starters	1
10. Responsibility for Information Resources	Data entry, text processing, storage of data; Occasional requirement to develop or create reports, documents, drawings Inputs financial data into computerised and paper databases/systems; creates financial spreadsheets	2ab
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work. Completes e.g. staff surveys	1
12. Freedom to Act	Standard operating procedures, someone is available for reference Works within set routines with little direct supervision but with advice available when required.	2
13. Physical Effort	Frequent requirement for sitting or standing in a restricted position Inputs at a keyboard for most of the day	2a
14. Mental Effort	Frequent concentration, work pattern predictable /Occasional prolonged concentration Concentration required when inputting data, checking information and when answering queries from staff/customers/occasional requirement to concentrate for long periods when inputting data.	2a-3b
15. Emotional Effort	Exposure to distressing or emotional circumstances is rare. Limited contact with distressed patients, clients and staff	1
16. Working Conditions	Use VDU more or less continuously. Uses keyboard continuously for substantial proportion of the day.	2e
JE Score/Band	JE Score 162–193	Band 2

National profiles for Finance

Profile Label: Finance Officer

- Job Statement:**
1. Ensures financial, payroll information is processed in accordance with procedures and in order to provide information for statutory returns.
 2. Investigates enquiries and queries from suppliers and staff/customers and provides assistance and advice as required.
 3. Ensures that work is completed in line with financial timescales
 4. May advise patients, clients regarding e.g. charges

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive routine information requiring tact or persuasive skills; provide and receive complex or sensitive information Discusses queries from staff, customers and suppliers where there may be issues about non-payment, incorrect or late payments or other sensitive issues; communicates statutory financial regulations and NHS rules in a simplified form to non-finance people, discusses complicated financial matters e.g. concerning invoices and payments.	3ab
2. Knowledge, Training & Experience	Range of work procedures and practices, base level of theoretical knowledge Knowledge of finance computer systems and of other finance areas e.g. finance coding structures, petty cash, VAT, balancing and reconciling accounts/ledgers, payroll procedures and agreements acquired through NVQ level 3/Association of Accounting Technicians (AAT) Intermediate Level; European Computer Driving License (ECDL) Advanced Level; or equivalent experience.	3
3. Analytical & Judgemental Skills	Judgements involving facts or situations, some requiring analysis/ range of facts or situations requiring analysis Analyses and interprets financial payments and receipts. Investigates financial queries and analyses detailed data to identify errors and discrepancies. Carries out detailed financial calculations/Analyses, investigates and resolves complex financial queries and discrepancies. Analyses financial data to identify errors and sorts out problems from a range of options. Makes complex calculations about payments and decides whether and how to pursue over/under payments.	2-3
4. Planning & Organisational Skills	Plan and organise straightforward tasks some of which may be ongoing Plans workload to ensure weekly, monthly, quarterly and annual financial timetables met.	2
5. Physical Skills	Developed physical skills; advanced keyboard use Inputs and manipulates financial data into computer databases and spreadsheets, where speed and accuracy are necessary	3a
6. Responsibility for Patient/Client Care	Assist patients/ clients during incidental contacts /provide non-clinical advice, information to patients/ clients/ relatives Patient contact is incidental/deals with patient and client payments (e.g. reimbursements for travel/losses and compensation claims) and patient property. Advises patients/clients regarding e.g. charges	1-2
7. Responsibility for Policy/Service Development	Implement policies and propose changes to working practices for own area. Proposes changes to working practices and procedures (e.g. when planning for the impact of new legislation), implements procedures set by others	2
8. Responsibility for Financial & Physical Resources	Handle cash, valuables; authorised signatory Responsible for petty cash float, prepares cash for manual payments, handles patient property and travel expenses; collects cash/cheques etc. from other sources (i.e. catering/car parking, telephones/IVF payments etc) /authorises time sheets and overtime.	2ad – 3a
9. Responsibility for Human Resources	Demonstrate own activities to new or less experienced employees / Day –to-day co- ordination of staff; provide practical training Demonstrates activities, work routines to others in own work area/allocates work to more junior staff in the section; provides induction training for trainees or new members of staff	1-2ac
10. Responsibility for Information Resources	Data entry, text processing, storage of data; occasional requirement to develop or create reports, documents, drawings Inputs financial data into computerised and paper databases/systems; creates financial spreadsheets	2ab
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work Completes e.g. staff surveys	1
12. Freedom to Act	Standard operating procedures, someone available for reference/clearly defined operational policies, work is managed, rather than supervised Works within set routines with little direct supervision but with advice available when required/works within policies and procedures and refers to manager when necessary	2-3
13. Physical Effort	Frequent requirement for sitting in a restricted position Inputs at a keyboard for most of the day	2a
14. Mental Effort	Frequent concentration, work pattern predictable /Occasional prolonged concentration Concentration required when inputting data, checking and reconciling information, making calculations and when answering queries from staff and customers/occasional requirement to concentrate for long	2a-3b

National profiles for Finance

	periods when inputting data and when analysing data/statistics	
15. Emotional Effort	Exposure to distressing or emotional circumstances is rare. Limited contact with distressed patients, clients and staff	1
16. Working Conditions	Use VDU more or less continuously Uses keyboard continuously for substantial proportion of the day.	2e
JE Score/Band	JE Score 223–270	Band 3

National profiles for Finance

Profile Label: Finance Officer (Higher Level)

- Job Statement:**
1. Ensures financial information is processed in accordance with procedures and in order to provide information for statutory returns, through completion of own work and through the coordination of the work of others.
 2. Investigates financial enquiries, providing assistance and advice as required.
 3. Ensures that work is completed in line with financial timescales and legal requirements.
 4. May provide advice to patients, clients regarding e.g. charges

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive routine information requiring tact or persuasive skills; provide and receive complex or sensitive information Discusses routine queries from staff, customers and suppliers where there may be issues about non-payment, incorrect or late payments or other sensitive issues; communicates statutory financial regulations and NHS rules in a simplified form to non-finance people, discusses complicated financial matters e.g. concerning invoices and payments	3ab
2. Knowledge, Training & Experience	Range of work procedures and practices, majority non-routine, intermediate level theoretical knowledge Detailed understanding of accounting procedures (reconciliation and balances, VAT payments and deductions, finance computer systems and ledgers, coding structures, payroll agreements and procedures), knowledge of legislation as it affects own finance area acquired through NVQ Level 4/Association of Accounting Technicians (AAT) Technician Level or equivalent experience	4
3. Analytical & Judgemental Skills	Range of facts or situations requiring comparison of a range of options Analyses, investigates and resolves financial queries and discrepancies. Analyses financial data to identify errors and sorts out problems from a range of options. Carries out complex calculations about payments and decides whether and how to pursue over/under payments.	3
4. Planning & Organisational Skills	Plan and organise straightforward tasks some ongoing. Plans own workload to ensure weekly, monthly, quarterly and annual financial timetables are met	2
5. Physical Skills	Developed physical skills, advanced keyboard use. Inputs financial data into computer databases and spreadsheets, where speed and accuracy are necessary	3a
6. Responsibility for Patient/Client Care	Assist patients/ clients during incidental contacts /Provide non-clinical advice, information to patients/ clients/ relatives Contact with patients is incidental/advises patients/clients regarding e.g. charges.	1-2
7. Responsibility for Policy/Service Development	Implement policies and propose changes to practices, procedures for own area Proposes changes to working practices and procedures (e.g. when planning for the impact of new legislation) and implements procedures set by others	2
8. Responsibility for Financial & Physical Resources	Authorised signatory; monitor budgets or financial initiatives Authorised signatory; contributes to formulation of section budgets, external budgets.	3ac
9. Responsibility for Human Resources	Demonstrate own activities to new or less experienced employees / day to day co- ordination of staff; provide practical training. Demonstrates activities, work routines to others in own work area/allocates work to more junior staff in the section; provides some induction training for trainees, new members of staff, delivers finance training to non-finance managers.	1-2ac
10. Responsibility for Information Resources	Data entry, text processing, storage of data; occasional/ regular requirement to develop or create reports, documents, drawings Inputs financial data into computerised and paper databases, systems/ designs and formats spreadsheets and databases for specific purposes	2ab- 3b
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work/Regularly undertake R&D activity Completes e.g. staff surveys /designs and conducts complex audits to improve financial and accounting services	1-2a
12. Freedom to Act	Clearly defined occupational policies, work is managed, rather than supervised Works within policies and procedures, work is managed rather than supervised	3
13. Physical Effort	Frequent requirement for sitting or standing in a restricted position Inputs at a keyboard for a significant part of the day	2a
14. Mental Effort	Frequent concentration, work pattern predictable / frequent concentration, work pattern unpredictable; occasional prolonged concentration Concentration required when inputting data, checking and reconciling information, making calculations and when answering queries from staff and customers/ may be required to switch tasks; requirement to concentrate for long periods when inputting data and when analysing data, statistics	2a- 3ab
15. Emotional Effort	Exposure to distressing or emotional circumstances is rare Limited contact with distressed patients, clients and staff	1

National profiles for Finance

16. Working Conditions	Use VDU more or less continuously Uses keyboard for significant proportion of the day	2e
JE Score/Band	JE Score 281–312	Band 4

National profiles for Finance

Profile Label:
Job Statement:

Finance Team Leader

1. Leads a team of finance, payroll staff e.g. payroll.
2. Ensures financial information is processed in accordance with procedures and in order to provide information for statutory returns.
3. Investigates enquiries, providing assistance and advice as required.
4. Ensures that work is completed in line with financial timescales and legal requirements
5. May provide advice to patients, clients regarding e.g. charges

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide routine information requiring tact or persuasive skills; provide and receive complex or sensitive information/ persuasive skills required Discusses financial queries, complex queries with staff, suppliers, customers, including reasons for delays in payment and other sensitive issues/discusses financial issues with customers, which may be contentious and communicates performance issues relating to staff	3ab - 4a
2. Knowledge, Training & Experience	Range of work procedures and practices, majority non-routine, intermediate level theoretical knowledge Detailed understanding of accounting procedures (e.g. reconciliation and balances, VAT payments and deductions, finance computer systems and ledgers, coding structures, payroll agreements and procedures), knowledge of legislation as it affects own finance area acquired through NVQ Level 4/Association of Accounting Technicians (AAT) Technician Level/NEBS Level 3; or equivalent experience	4
3. Analytical & Judgemental Skills	Range of facts or situations requiring comparison of a range of options Analyses and interprets financial payments. Investigates complex financial queries and analyses detailed data to identify errors/discrepancies. Carries out complex financial calculations.	3
4. Planning & Organisational Skills	Plan and organise straightforward tasks some ongoing Plans team workload to ensure weekly, monthly, quarterly and annual financial timetables are met.	2
5. Physical Skills	Developed physical skills, advanced keyboard use Inputs financial data into computer databases and spreadsheets, where speed and accuracy are necessary	3a
6. Responsibility for Patient/Client Care	Assist patients/ clients during incidental contacts /provide non-clinical advice, information to patients/ clients/ relatives Contact with patients is incidental/advises patients/clients e.g. regarding charges etc.	1-2
7. Responsibility for Policy/Service Development	Implement policies and propose changes to practices, procedures for own area. Proposes changes to working practices and procedures (e.g. when planning for the impact of new legislation) and implements procedures set by others	2
8. Responsibility for Financial & Physical Resources	Authorised signatory; monitor budgets or financial initiatives. Authorised signatory; contributes to formulation of section budgets, external budgets.	3ac
9. Responsibility for Human Resources	Day to day supervision; provide training in own discipline/ day to day management Allocates work to more junior staff in the section; provides induction training for trainees, new members of staff/day to day team management including e.g. recruitment (or assisting with recruitment), appraisal, discipline, training, delegation	2ac- 3a
10. Responsibility for Information Resources	Data entry, text processing, storage of data; occasional requirement to develop or create reports, documents, drawings Inputs financial data into computerised and paper databases/systems; creates financial spreadsheets	2ab
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work. Completes e.g. staff surveys	1
12. Freedom to Act	Clearly defined occupational policies, work is managed, rather than supervised Works within policies and procedures and work is managed rather than supervised.	3
13. Physical Effort	Combination of sitting, standing, walking/ frequent sitting, standing in a restricted position Light physical effort/required to sit at a keyboard for a significant proportion of the working day.	1-2a
14. Mental Effort	Frequent concentration, work pattern predictable /Frequent concentration, work pattern unpredictable; occasional prolonged concentration Concentration required when inputting data, checking and reconciling information, making calculations and when answering queries from staff, customers/occasional requirement to concentrate for long periods when inputting data and when analysing data/statistics; may be required to switch tasks.	2a- 3ab
15. Emotional Effort	Occasional exposure to distressing or emotional circumstances. Deals with staff performance and disciplinary issues	2(a)
16. Working Conditions	Exposure to unpleasant conditions is rare/ use VDU more or less continuously Office conditions/uses keyboard for significant proportion of the day.	1-2e
JE Score/Band	JE Score 286–324	Band 4

National profiles for Finance

Profile Label: **Finance Analyst**

- Job Statement:
1. Ensures financial information is processed in accordance with procedures, in order to provide information for statutory returns, through completion of own work and through the coordination of the work of others.
 2. Investigates complex financial enquiries, providing assistance and advice as required.
 3. Ensures that work is completed in line with financial timescales and legal requirements, interpreting these where necessary.
 4. May provide advice to patients, clients regarding e.g. charges

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex, sensitive information, persuasive, motivational, negotiating, training skills are required Discusses financial queries with staff, suppliers, customers, which are often complex, including reasons for delays in payment and other sensitive issues; discusses financial issues with customers, which may be contentious; provides advice on complex financial and corporate issues to non-financial managers; negotiates with NHS, external organisations over cost, service issues	4(a)
2. Knowledge, Training & Experience	Expertise within a specialism, underpinned by practical experience. Experience and expertise in a range of accounting areas (e.g. reconciliation and balances, VAT payments and deductions, finance computer systems and ledgers, coding structures, payroll agreements and procedures)., knowledge of legislation as it affects own finance area, acquired through professional accountancy qualifications – Certificate Level/Association of Accounting Technicians (AAT) Member or equivalent experience to degree level	5
3. Analytical & Judgemental Skills	Range of facts or situations requiring analysis/Complex facts or situations requiring analysis, interpretation and comparison of a range of options Analyses financial data. Analyses, investigates and resolves financial queries and discrepancies/complex financial queries and discrepancies	3-4
4. Planning & Organisational Skills	Plan and organise straightforward activities, some ongoing Plans to ensure weekly, monthly, quarterly and annual financial timetables are met	2
5. Physical Skills	Developed physical skills, advanced keyboard use Inputs and manipulates financial data into computer databases and spreadsheets, where speed and accuracy are necessary	3a
6. Responsibility for Patient/Client Care	Assist patients /clients during incidental contacts /provide non-clinical advice, information to patients/ clients/ relatives Patient contact is incidental/advises patients and clients regarding e.g. charges	1-2
7. Responsibility for Policy/Service Development	Implement policies and propose changes to work practices, procedures for own area/ propose policy or service changes, which impact beyond own area Proposes changes to working practices and procedures (e.g. when planning for the impact of new legislation) and implements plans in own area/proposes changes to and redesigns local accounting and financial policies and procedures, which have an impact in other areas	2-3
8. Responsibility for Financial & Physical Resources	Authorised signatory; monitor budgets or financial initiatives Authorised signatory; contributes to formulation of section, external budgets.	3ac
9. Responsibility for Human Resources	Day to day co-ordination of staff; provide practical training. Co-ordinates the work of more junior staff in the section; delivers finance training to non-finance managers	2ac
10. Responsibility for Information Resources	Regular requirement to develop or create reports, documents, drawings Designs, formats financial spreadsheets and databases	3b
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work/Regularly undertake R&D activity Undertakes surveys or audits as necessary to own work/designs and conducts complex audits to improve financial and accounting services	1-2a
12. Freedom to Act	Clearly defined occupational policies, work is managed, rather than supervised Works within policies and procedures, work is managed not supervised	3
13. Physical Effort	Combination of sitting, standing, walking/Frequent requirement for sitting or standing in a restricted position Light physical effort/ inputs at a keyboard for most of the day	1-2a
14. Mental Effort	Frequent concentration, work pattern predictable / unpredictable; occasional prolonged concentration Concentration required when inputting data, checking and reconciling information, making calculations and when answering queries from staff, customers/may be required to switch tasks; requirement to concentrate for long periods when inputting data and when analysing data, statistics	2a-3ab
15. Emotional Effort	Exposure to distressing or emotional circumstances is rare Limited contact with distressed patients, clients and staff	1

National profiles for Finance

16. Working Conditions	Exposure to unpleasant conditions is rare/ use VDU more or less continuously Office conditions/uses keyboard for significant proportion of the day	1-2e
JE Score/Band	JE Score330–379	Band 5

National profiles for Finance

Profile Label: Finance Team Manager

- Job Statement:**
1. Responsible for the daily management of a finance team e.g. payroll, financial accounts.
 2. Ensures financial information is processed in accordance with procedures, in order to provide information for statutory returns.
 3. Investigates complex enquiries providing assistance and advice as required.
 4. Ensures that work is completed in line with financial timescales and legal requirements, interpreting these where necessary
 5. May provide advice to patients/clients regarding e.g. charges

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex information, persuasive, motivational, negotiating, training skills are required Discusses financial queries with staff, suppliers, customers, which are often complex, including reasons for delays in payment and other sensitive issues. Discusses financial issues with customers, which may be contentious; deals with performance, feedback, coaching, training and other issues relating to staff. Provides advice on complex financial and corporate issues to non-financial managers. Negotiates with NHS, external organisations over cost, service issues.	4a
2. Knowledge, Training & Experience	Expertise within a specialism, underpinned by theory Experience and expertise in a range of accounting areas (e.g. reconciliation and balances, VAT payments and deductions, finance computer systems and ledgers, coding structures, payroll agreements and procedures), knowledge of legislation as it affects own finance area, acquired through NVQ Level 5/professional accountancy qualifications – Certificate Level/Association of Accounting Technicians (AAT) Member or equivalent experience to degree level plus supervisory experience.	5
3. Analytical & Judgemental Skills	Range of facts or situations requiring comparison of a range of options Analyses, investigates and resolves financial queries and discrepancies. Analyses financial data to identify errors and sorts out problems from a range of options. Makes calculations about payments and decides whether and how to pursue over/under payments.	3
4. Planning & Organisational Skills	Plan and organise straightforward tasks, some ongoing /complex activities requiring formulation, adjustment Plans workload to ensure weekly, monthly, quarterly and annual financial timetables are met/undertakes staff or complex work planning	2-3
5. Physical Skills	Physical skills obtained through practice/ Developed physical skills, advanced keyboard use Requires standard keyboard skills/inputs financial data into computer databases and spreadsheets, where speed and accuracy are necessary	2-3a
6. Responsibility for Patient/Client Care	Assist patients/ clients during incidental contacts/provide non-clinical advice, information to patients/ clients/ relatives Contact with patients is incidental/advises patients/clients regarding e.g. charges	1-2
7. Responsibility for Policy/Service Development	Implement policies and propose changes to practices, procedures for own area/Propose policy or service changes, which impact beyond own area. Proposes changes to working practices and procedures (e.g. when planning for the impact of new legislation) and implements procedures in own area /proposes changes to and redesigns local accounting and financial policies and procedures, which have an impact in other areas.	2-3
8. Responsibility for Financial & Physical Resources	Authorised signatory; monitor budgets or financial initiatives Authorised signatory; contributes to formulation of section budgets, external budgets.	3ac
9. Responsibility for Human Resources	Day to day management; teach, deliver specialist training Day to day management of team including e.g. recruitment (or assisting with recruitment), appraisal, discipline, training; Delivers training on a range of subjects related to own area	3ac
10. Responsibility for Information Resources	Data entry, text processing, storage of data; occasional / regular requirement to develop or create reports, documents, drawings Inputs financial data into computerised and paper databases, systems; creates financial Spreadsheets	2ab -3b
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work/regularly undertake R&D activities Undertakes surveys or audits as required for own work/undertakes e.g. complex audits within the finance department.	1-2a
12. Freedom to Act	Clearly defined occupational policies, work is managed, rather than supervised Works within policies and procedures; managed rather than supervised	3
13. Physical Effort	Combination of sitting, standing and walking/ frequent light effort for several short periods Light physical effort/ lifting and carrying files	1-2b
14. Mental Effort	Frequent concentration, work pattern predictable / work pattern unpredictable; occasional prolonged concentration Concentration required when analysing data, checking and reconciling information, making	2a-3ab

National profiles for Finance

	calculations and when answering queries from staff, customers/may be required to switch tasks; requirement to concentrate for long periods when inputting data and when analysing data/statistics	
15. Emotional Effort	Occasional exposure to distressing or emotional circumstances Deals with staff performance and disciplinary issues.	2a
16. Working Conditions	Exposure to unpleasant working conditions is rare Office conditions	1
JE Score/Band	JE Score 326–387	Band 5

National profiles for Finance

Profile Label: Finance Analyst, Specialist

- Job Statement:**
1. Ensures financial information is processed in accordance with procedures through completion of own work and through the coordination of the work of others.
 2. Investigates complex financial enquiries, providing assistance and advice as required.
 3. Prepares and completes statutory/NHS accounts and returns, ensuring that work is completed in line with financial timescales and legal requirements, interpreting these where necessary.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex information, persuasive, motivational, negotiating, training skills are required Discusses financial queries with staff, suppliers, internal customers, which are often complex, including reasons for delays in payment and other sensitive issues; discusses financial issues with customers, which may be contentious; provides advice on complex financial and corporate issues to non-financial managers; negotiates with NHS, external organisations over cost, service issues.	4(a)
2. Knowledge, Training & Experience	Specialist knowledge across work procedures underpinned by theory Specialist knowledge and expertise across one or more specialised areas including management; advises finance and non-finance managers on matters relating to their own area, providing detailed advice and guidance, acquired through Professional Accountancy Qualifications – postgraduate Diploma Level or equivalent experience.	6
3. Analytical & Judgemental Skills	Complex facts or situations requiring analysis, interpretation, comparison of a range of options Analyses complex financial trends involving many streams of data and forecasts strategic and operational financial expenditure using a wide range of data and assumptions; develops and advises on complex business plans and investigates and resolves complex payment errors.	4
4. Planning & Organisational Skills	Plan and organise complex activities or programmes, requiring formulation, adjustment Contributes to long-term financial plans, makes plans for tax and legislative changes, makes daily adjustments to plans, schedules in order to deal with organisation requirements and to ensure targets are met, coordinates and plans activities with other professionals and agencies e.g. auditors, Inland Revenue	3
5. Physical Skills	Physical skills obtained through practice Requires standard keyboard skills	2
6. Responsibility for Patient/Client Care	Assist patients/clients/relatives during incidental contact. Limited contact with patients, clients, staff	1
7. Responsibility for Policy/Service Development	Propose policy or service changes, impact beyond own area Suggests changes to and implements accounting and financial policies and procedures in own area or section, proposes changes to and redesigns local accounting and financial policies and procedures, which have an impact in other areas	3
8. Responsibility for Financial & Physical Resources	Authorised signatory; monitor budgets or financial initiatives/ budget setting for department/ service Authorised signatory; contributes to formulation of section, external budgets/develops and monitors budgets for an external department, service, programme	3ac – 4b
9. Responsibility for Human Resources	Day to day co-ordination of staff; provide practical training/ teach, deliver specialist training Allocates and checks the work of more junior staff in the section; delivers finance training/ specialist training	2ac – 3c
10. Responsibility for Information Resources	Regular requirement to develop or create reports, documents, drawings/ adapt, design information systems to meet specifications of others Designs, formats spreadsheets and databases for specific purposes/ responsible for introducing, adapting and improving financial systems in own area of responsibility	3b-4a
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work/regularly undertake R&D activity as a requirement of the job Undertakes surveys or audits for own work/designs and conducts complex audits	1-2a
12. Freedom to Act	Broad occupational policies Works to achieve agreed objectives and is given freedom to do this in own way working within broad professional policies, acts without reference to manager	4
13. Physical Effort	Combination of sitting, standing, walking Light physical effort	1
14. Mental Effort	Frequent concentration, work pattern predictable /unpredictable; occasional prolonged concentration Concentration required when analysing data, checking and reconciling information, making calculations and when answering queries from staff, customers/may be required to switch tasks; requirement to concentrate for long periods when analysing complex data/statistics and preparing financial returns with no notice	2a-3ab

National profiles for Finance

15. Emotional Effort	Exposure to distressing or emotional circumstances is rare Limited contact with distressed patients, clients and staff	1
16. Working Conditions	Exposure to unpleasant conditions is rare Office conditions	1
JE Score/Band	JE Score 401–441	Band 6

National profiles for Finance

Profile Label: Finance Section Manager

- Job Statement:**
1. Responsible for the overall management and performance of a finance section.
 2. Ensures financial information is processed in accordance with procedures and investigates complex enquiries providing assistance and advice as required.
 3. Prepares and completes statutory/NHS accounts and returns, ensuring that work is completed in line with financial timescales and legal requirements, interpreting these where necessary.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex, sensitive information, persuasive, motivational, negotiating, training skills are required Discusses financial queries with staff, suppliers, customers, which are often complex, including reasons for delays in payment and other sensitive issues; discusses financial issues with customers, which may be contentious and deals with performance, feedback, coaching, training and counselling issues relating to staff; provides advice on complex financial and corporate issues to non-financial managers; negotiates with NHS, external organisations over cost, service issues	4(a)
2. Knowledge, Training & Experience	Specialist knowledge across range of procedures underpinned by theory Specialist knowledge and expertise across one or more specialised areas including management, advises finance and non-finance managers on matters relating to their own area, providing detailed advice and guidance, acquired through Professional Accountancy Qualifications – postgraduate Diploma Level or equivalent experience	6
3. Analytical & Judgemental Skills	Complex facts or situations requiring analysis, interpretation and comparison of a range of options Analyses complex financial trends involving many streams of data and forecasts strategic and operational financial expenditure using a wide range of data and assumptions; develops and advises on complex business plans; investigates and resolves complex payment errors	4
4. Planning & Organisational Skills	Plan and organise complex activities, or programmes, requiring formulation, adjustment Develops and contributes to long-term plans within a structured framework, makes plans for tax and legislative changes, makes daily adjustments to plans, schedules in order to deal with organisation requirements and to ensure targets are met, co-ordinates and plans activities with other professionals and agencies e.g. auditors, Inland Revenue	3
5. Physical Skills	Physical skills obtained through practice Requires standard keyboard skills	2
6. Responsibility for Patient/Client Care	Assist patients/clients during incidental contacts. Incidental or limited contact with patients, clients	1
7. Responsibility for Policy/Service Development	Propose policy or service changes, impact beyond own area. Suggests changes to and implements accounting and financial policies and procedures in own area or section, proposes changes to and redesigns local accounting and financial policies and procedures, which have an impact in other areas.	3
8. Responsibility for Financial & Physical Resources	Authorised signatory; monitor budgets or financial initiatives/ budget holder for a department/ service; budget setting for department/ service Authorised signatory, contributes to formulation of section budgets or external budgets; monitors budget for own department, finance section and authorises spend against it/ holds budget; develops and monitors budgets for an external department, service, programme	3ac-4ab
9. Responsibility for Human Resources	Day-to-day management; teach/deliver specialist training/ line manager for a single function or department Undertakes day to day management; delivers training on a range of subjects related to own area/line manager for a group of staff	3ac-4a
10. Responsibility for Information Resources	Regular requirement to develop or create reports, documents, drawings/ adapt, design information systems to meet specifications of others Designs formats spreadsheets and databases/responsible for introducing, adapting and improving financial systems in own area of responsibility, for use by others	3b-4a
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work/regularly undertake R&D activity Undertakes surveys or audits for own work/designs and conducts complex audits	1-2a
12. Freedom to Act	Broad occupational policies Works to achieve agreed objectives and is given freedom to do this in own way, working within broad professional policies; acts without reference to manager	4
13. Physical Effort	Combination of sitting, standing, walking Light physical effort	1
14. Mental Effort	Frequent concentration, work pattern unpredictable; occasional prolonged concentration. Concentration required when analysing data, checking and reconciling information, making calculations and when answering queries from staff, customers, may be required to switch tasks;	3ab

National profiles for Finance

	requirement to concentrate for long periods when analysing complex data, statistics and preparing financial returns	
15. Emotional Effort	Occasional exposure to distressing or emotional circumstances Deals with staff performance and disciplinary issues	2(a)
16. Working Conditions	Exposure to unpleasant conditions is rare Office conditions	1
JE Score/Band	JE Score 421–458	Band 6

National profiles for Finance

Profile Label: Finance Analyst, Advanced

- Job Statement:**
1. Ensures financial information is processed in accordance with procedures through completion of own work and through the coordination of the work of others.
 2. Investigates highly complex enquiries providing assistance and advice as required and contributes to corporate reporting/providing strategic/business planning advice.
 3. Prepares and completes statutory/NHS accounts and returns, ensuring that work is completed in line with financial timescales and legal requirements, interpreting these where necessary.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex information, persuasive, motivational, negotiating, training skills are required Discusses complex financial queries with staff, suppliers, internal customers, including reasons for delays in payment and other sensitive issues; discusses financial issues with customers, which may be contentious; provides advice on complex financial and corporate issues to non-financial managers; negotiates with NHS, external organisations over cost, service issues.	4(a)
2. Knowledge, Training & Experience	Highly developed specialist knowledge, underpinned by theory and experience. In depth specialist knowledge of financial and accounting procedures, financial aspects of NHS legislation and NHS finance policies; advises finance and non-finance managers on matters relating to their own area, providing detailed advice and guidance; equivalent knowledge and experience to: Professional Accountancy Qualifications plus knowledge, experience and expertise in a finance management role.	7
3. Analytical & Judgemental Skills	Highly complex facts or situations requiring analysis, interpretation and comparison of a range of options Analyses highly complex problems relating to business case production and analysis; multiplicity of targets, objectives and makes judgements regarding allocation of finances; makes judgements on financial decisions and financial risk where there is no precedent and where other leading opinions may conflict.	5
4. Planning & Organisational Skills	Plan and organise broad range of complex activities, formulate, adjust plans or strategies Plans projects which impact across the department and the organisation; delivery of accounting, financial services over the financial year for own area; prepares plans for financial and people aspects of service provision; contributes to medium term financial strategy.	4
5. Physical Skills	Physical skills obtained through practice Requires standard keyboard skills.	2
6. Responsibility for Patient/Client Care	Assist patients/clients during incidental contacts Incidental contact with patients, clients	1
7. Responsibility for Policy/Service Development	Propose policy or service changes, impact beyond own area Suggests changes to and implements accounting policies and financial procedures in own area or section; proposes changes to and redesigns local accounting and financial policies and procedures, which impact in other areas.	3
8. Responsibility for Financial & Physical Resources	Authorised signatory; monitor budgets or financial initiatives/ budget setting for a department/ service Authorised signatory; contributes to formulation of section budgets, external budgets/develops and monitors budgets for an external department, service or programme, providing financial advice to them as required	3ac – 4b
9. Responsibility for Human Resources	Day to day co-ordination of staff; provide practical training/ teach/ deliver specialist training Allocates work to more junior staff in the section; provides training/ delivers formal finance training to a range of non-finance managers.	2ac –3c
10. Responsibility for Information Resources	Regular requirement to develop or create reports, documents, drawings/ adapt, design information systems to meet specifications of others Designs, formats spreadsheets and databases for specific purposes/responsible for introducing, adapting and improving financial systems for use by others	3b-4a
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work/Regularly undertake R&D activity Undertakes surveys or audits for own work/designs and conducts complex audits to improve financial and accounting services.	1-2a
12. Freedom to Act	Broad occupational policies Works to achieve agreed objectives and is given freedom to do this in own way, working within broad professional policies; acts without reference to manager; acts as lead specialist in a particular financial area.	4
13. Physical Effort	Combination of sitting, standing, walking Light physical effort	1
14. Mental Effort	Frequent concentration, work pattern predictable / unpredictable; occasional prolonged concentration Concentration required when inputting data, checking and reconciling information, making calculations and when answering queries from staff, customers/may be required to switch tasks; occasional requirement to concentrate for long periods when analysing complex data, statistics and	2a-3ab

National profiles for Finance

	preparing financial returns	
15. Emotional Effort	Exposure to distressing or emotional circumstances is rare Limited contact with distressed patients, clients and staff	1
16. Working Conditions	Exposure to unpleasant conditions is rare Office conditions	1
JE Score/Band	JE Score 474-514	Band 7

National profiles for Finance

Profile Label: Finance Department Manager

- Job Statement:**
1. Responsible for the overall management and performance of a finance department.
 2. Ensures financial information is processed in accordance with procedures; investigates highly complex enquiries providing assistance and advice as required and contributes to corporate reporting, providing strategic, business planning advice.
 3. Prepares and completes statutory, NHS accounts and returns, ensuring that work is completed in line with financial timescales and legal requirements, interpreting these where necessary.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex information, persuasive, motivational, negotiating, training skills are required Discusses complex financial queries with staff, suppliers, customers, including reasons for delays in payment and other sensitive issues; discusses financial issues with customers, which may be contentious and deals with performance, feedback, coaching, training and counselling issues relating to staff; provides advice on complex financial and corporate issues to non-financial managers; negotiates with NHS, external organisations over cost, service issues.	4(a)
2. Knowledge, Training & Experience	Highly developed specialist knowledge, underpinned by theory and experience. In depth specialist knowledge of financial and accounting procedures, financial aspects of NHS legislation and NHS finance policies. Advises finance and non-finance managers on matters relating to their own area, providing detailed advice and guidance; equivalent knowledge and experience to: Professional Accountancy Qualifications plus knowledge, experience and expertise in finance management and staff management.	7
3. Analytical & Judgemental Skills	Complex/highly complex facts or situations requiring analysis, interpretation and comparison of a range of options Analyses complex problems relating to business case production and analysis; multiplicity of targets /objectives and makes judgements regarding allocation of finances/analyses highly complex budgets and data sets and interprets financial accounts, makes judgements on financial decisions and financial risk where there is no precedent and where opinions may conflict.	4-5
4. Planning & Organisational Skills	Plan and organise broad range of complex activities, formulate, adjust plans or strategies. Plans projects which impact across the department & organisation, delivery of accounting, financial services over the financial year for own area; contributes to medium term financial strategy.	4
5. Physical Skills	Physical skills obtained through practice Requires standard keyboard skills.	2
6. Responsibility for Patient/Client Care	Assist patients/clients during incidental contacts Incidental contact with patients, clients	1
7. Responsibility for Policy/Service Development	Propose policy or service changes, impact beyond own area Suggests changes to, implements accounting policies and financial procedures in own area, proposes changes to and redesigns local accounting and financial policies and procedures, which have an impact in other areas.	3
8. Responsibility for Financial & Physical Resources	Authorised signatory; monitor budgets or financial initiatives/Budget holder for a department/ service; budget setting for a department/ service Authorised signatory; contributes to formulation of section budgets or external budgets, monitors budget for own department, authorises spend against it; develops and monitors budgets for an external department, service or programme, providing financial advice as required.	3ac-4ab
9. Responsibility for Human Resources	Day-to-day management; teach, deliver specialist training/line manager for a single function or department; teach, devise training and development programmes, major job responsibility Day to day management including recruitment (or assisting with recruitment), appraisal, discipline, training, delegation; Delivers training on a range of subjects related to own area/line manager for a group of staff; designs and delivers training programmes for finance staff	3ac-4ab
10. Responsibility for Information Resources	Regular requirement to develop or create reports, documents, drawings/ adapt, design information systems to meet specifications of others Designs, formats spreadsheets and databases for specific purposes/ responsible for introducing, adapting and improving financial systems in own area of responsibility for use by others.	3b-4a
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work/Regularly undertake R&D activity Undertakes surveys or audits for own work/designs and conducts complex audits to improve financial and accounting services.	1-2a
12. Freedom to Act	Broad occupational policies Works to achieve agreed objectives and is given freedom to do this in own way, working within broad professional policies; acts without reference to manager; acts as lead specialist in a particular financial area.	4
13. Physical Effort	Combination of sitting, standing, walking Light physical effort	1

National profiles for Finance

14. Mental Effort	Frequent concentration, work pattern predictable /unpredictable; occasional prolonged concentration Concentration required when inputting data, checking and reconciling information, making calculations and when answering queries from staff, customers/may be required to switch tasks; occasional requirement to concentrate for long periods when analysing complex data, statistics and preparing financial returns	2a-3ab
15. Emotional Effort	Occasional exposure to distressing or emotional circumstances Deals with staff performance and disciplinary issues	2a
16. Working Conditions	Exposure to unpleasant conditions is rare Office conditions	1
JE Score/Band	JE Score 471–531	Band 7

National profiles for Finance

Profile Label: Principal Finance Manager

- Job Statement:**
1. Responsible for the overall management and performance of a finance section/department.
 2. Takes responsibility for managing one or more complex financial areas; investigating and advising on highly complex issues and provides corporate reports/strategic financial and business planning advice in this area.
 3. Ensures statutory/NHS accounts and returns are accurate and meet financial timescales and legal requirements, interpreting these where necessary.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive highly complex, sensitive or contentious information, agreement or co-operation required; present complex, sensitive or contentious information to large groups Advises, constrains senior budget holders over financial issues, persuading them to a certain course of action, negotiates with NHS, external organisations over significant cost, service issues; develops and delivers formal, complex financial presentations (i.e. multi-faceted business cases) to large groups of (often senior) non-finance managers, conveys financial concepts clearly and persuasively	5ab
2. Knowledge, Training & Experience	Highly developed specialist knowledge, underpinned by theory and experience. In depth specialist knowledge of financial and accounting procedures, financial aspects of NHS legislation and NHS finance policies; advises finance and non-finance managers on matters relating to their own area, providing detailed advice and guidance; equivalent knowledge and experience to: Professional Accountancy Qualifications plus knowledge, experience and expertise in a finance management and staff management	7
3. Analytical & Judgemental Skills	Highly complex facts or situations, requiring analysis, interpretation and comparison of a range of options Analyses frequent highly complex problems relating to business case production and analysis; multiplicity of targets, objectives and makes judgements regarding allocation of finances; makes judgements on financial decisions and financial risk where there is no precedent and where other leading opinions may conflict.	5
4. Planning & Organisational Skills	Plan and organise broad range of complex activities, formulate, adjust plans or strategies Plans for projects which impact across the department and the organisation; delivery of accounting/ financial services over the financial year for own area; prepares plans for financial and people aspects of service provision; contributes to medium term financial strategy.	4
5. Physical Skills	Physical skills obtained through practice Requires standard keyboard skills.	2
6. Responsibility for Patient/Client Care	Assist patients/clients during incidental contacts Incidental contact with patients, clients	1
7. Responsibility for Policy/Service Development	Responsible for policy implementation and development for more than one area of activity Responsible for developing policy and procedures in a particular area of financial services, which will impact across the whole organisation.	4
8. Responsibility for Financial & Physical Resources	Budget holder for a department/service/ budget setting for a department/ service Develops, monitors budget for own department, authorises spend against it; develops and monitors budgets for an external department, service or programme, providing financial advice to them as required.	4ab
9. Responsibility for Human Resources	Day-to-day management / line manager for a single function or department. Responsible for day to day management including: recruitment (or assisting with recruitment), appraisal, discipline, training, delegation/ line manager for department.	3a-4a
10. Responsibility for Information Resources	Adapt, design information systems to meet specifications of others. Responsible for introducing, adapting and improving financial systems in own area of responsibility, for use by others.	4a
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work/Regularly undertake R&D activity Undertakes surveys or audits for own work/designs and conducts complex audits designed to improve financial and accounting services.	1-2a
12. Freedom to Act	General policies, need to establish interpretation Works autonomously, and interprets available standards e.g. DHSC policy; Accounting Standards	5
13. Physical Effort	Combination of sitting, standing, walking Light physical effort	1
14. Mental Effort	Frequent concentration, work pattern predictable /unpredictable; occasional prolonged concentration. Concentration required when inputting data, checking and reconciling information, making calculations and when answering queries from staff, customers/may be required to switch tasks with no notice; occasional requirement to concentrate for long periods when analysing complex data, statistics and preparing financial returns	2a-3ab
15. Emotional Effort	Occasional exposure to distressing or emotional circumstances	2a

National profiles for Finance

	Deals with staff performance and disciplinary issues.	
16. Working Conditions	Exposure to unpleasant conditions is rare Office conditions	1
JE Score/Band	JE Score 545–568	Band 8a

National profiles for Finance

Profile Label: Chief Finance Manager

- Job Statement:**
1. Responsible for the overall management and performance of part of a large finance function, all of a smaller function or more than one function within the organisation.
 2. Ensures efficiency, effectiveness, integrity and business focus of financial systems and processes.
 3. Investigates and advises on highly complex issues and leads on corporate reporting/providing strategic financial and business planning advice.
 4. Ensures all statutory/NHS accounts and returns represent a true and fair view and meet financial timescales and legal requirements, interpreting these where necessary.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive highly complex, sensitive or contentious information, agreement or co-operation required; present complex, sensitive or contentious information to large groups Advises, constrains senior budget holders over financial issues, persuading them to a certain course of action; develops and delivers formal, complex financial presentations (i.e. multi-faceted business cases) to large groups of (often senior) non-finance managers and conveys financial concepts clearly and persuasively.	5ab
2. Knowledge, Training & Experience	Advanced theoretical and practical knowledge Expert knowledge of financial and accounting procedures, financial and other aspects of legislation and NHS finance policies; experience and expertise in finance management, strategic and staff leadership roles; acquired through: Professional Accountancy Qualifications or equivalent, further specialist training and experience	8a
3. Analytical & Judgemental Skills	Highly complex facts or situations requiring analysis, interpretation, comparison of a range of options Analyses highly complex problems relating to business case production and analysis; multiplicity of targets/objectives and makes judgements regarding allocation of finances; makes judgements on financial decisions and financial risk where there is no precedent and where other leading opinions may conflict.	5
4. Planning & Organisational Skills	Plan and organise broad range of complex activities, formulate, adjust plans or strategies/Formulate long-term, strategic plans, involving uncertainty, may impact across the whole organisation. Plans projects which impact across the department and the organisation; delivery of accounting, financial services over the financial year for own area; prepares plans for financial and people aspects of service provision; contributes to medium term financial strategy/Develops and takes the lead in advising on long-term strategic financial/business planning for the whole organization	4-5
5. Physical Skills	Physical skills obtained through practice. Requires standard keyboard skills.	2
6. Responsibility for Patient/Client Care	Assist patients/clients during incidental contacts Incidental contact with patients, clients	1
7. Responsibility for Policy/Service Development	Responsible for policy implementation and development for more than one area of activity/responsible for policy implementation and development for directorate or equivalent Carries responsibility for developing policy and procedures in a particular area of financial services, which will impact across the whole organisation/develops financial policies and practices for the organisation, working jointly with other organisations to create a consistent approach; implements national policies and practices.	4-5
8. Responsibility for Financial & Physical Resources	Budget holder for a department service; budget setting for a department service/ Responsible for budget for several services; responsible for budget setting for several services. Develops and monitors budgets for an external department service or programme, providing financial advice to them as required; develops and monitors budget for own department, finance section and authorises spend against it/develops and manages the budget for a large part of the finance function – or for the whole of the function; develops and monitors budgets for several external departments, services or programmes, providing financial advice to them as required; responsible for the provision of financial advice and for developing and monitoring the budgets throughout the organisation	4ab-5ab
9. Responsibility for Human Resources	Line manager for a single function or department/ line manager for several/ multiple departments. Acts as line manager for a department/more than one department e.g. payroll, financial accounts	4a-5a
10. Responsibility for Information Resources	Design and develop major information systems to meet specifications of others/ manage, develop information, systems across the organisation, major job responsibility Constantly reviews, updates, upgrades and introduces new systems for managing the financial and accounting practices within the department/the organisation	5a-6
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work/Regularly undertake R&D activity Undertakes surveys or audits for own work/designs and conducts complex audits to improve financial and accounting services.	1-2a
12. Freedom to Act	Is guided by organisational and broad occupational policies but has to interpret these. Works autonomously, guided by national policy and regulations but has to interpret these.	5
13. Physical Effort	Combination of sitting, standing, walking Light physical effort	1

National profiles for Finance

14. Mental Effort	Frequent concentration, work pattern predictable/ unpredictable; occasional prolonged concentration. Concentration required when inputting data, checking and reconciling information, making calculations and when answering queries from staff, customers/may be required to switch tasks at short notice; occasional requirement to concentrate for long periods when analysing complex data, statistics and preparing financial returns	2a-3ab
15. Emotional Effort	Occasional exposure to distressing or emotional circumstances. Deals with staff performance and disciplinary issues.	2a
16. Working Conditions	Exposure to unpleasant conditions is rare Office conditions	1
JE Score/Band	JE Score 610–691	Band 8b–d