

# Transaction Services Manager

## Job Description & Person Specification –

A summary of the role responsibilities and person specification



University Hospitals  
Bristol and Weston  
NHS Foundation Trust

### Why Our Trust?

(3)

#### Terms and conditions

Post – Transaction Services Manager

Division – Trust Services

Department - Finance

Band – 5

Location – Bristol/Weston/Flexible

Annual leave – Up to 33 days dependant on NHS Service

Pension - The NHS Pension Scheme is a defined benefit scheme. Further details and outline of benefits can be found at: [www.nhsbsa.nhs.uk/pensions](http://www.nhsbsa.nhs.uk/pensions)

#### Job Purpose

The post holder will be responsible for the effective day to day management of a dedicated transaction services team in which they should be an expert in their field as well as managing a portfolio of individual work.

They will have a well-rounded knowledge of transaction services in general and will provide appropriate and supportive cross-cover supervision for other transaction services teams as agreed with the Head of Transaction Services.

They will work closely with the Deputy Head of Transaction Services to ensure that all transaction services activity is conducted to a high standard in line with department and Trust objectives.

Work is managed in line with Trust policies and procedures, and Standing Financial Instructions.

#### About us

**Our mission** is to improve the health of the people we serve by delivering exceptional care, teaching and research every day.

#### What you'll love about working here

**UHBW has been rated by the CQC as 'Good'** - our staff are proud to deliver excellent care. As a forward-thinking multi-award winning Trust, our world-leading research and innovations are having a positive local and global impact. Our hospitals are spread across Bristol and Weston-super-Mare, join us and you can enjoy the very best of both worlds; city living within a stone's throw of the countryside or beside the seaside, both with easy access to all that the South West has to offer.

**A digital exemplar**- Being appointed as a Global Digital Exemplar means we can realise this vision by implementing digital technologies that will help us to transform the way we work and how we relate to our colleagues, patients and partner organizations.

**Sustainable healthcare** - We have joined the international movement to declare a climate emergency, recognising the impact climate change is having on the world. Climate change is labelled as the greatest threat to health in the 21st century, with a range of conditions related to heat, cold, extreme weather and air pollution predicted to rise. To lead the way in healthcare the Trust has set ambitious goals to become carbon neutral by 2030.

**Access to further opportunities with the Trust** - Apprenticeships are a great way to learn and earn on the job. UH Bristol and Weston provides a range of apprenticeships to support a huge number of career opportunities in clinical and non-clinical support services with apprenticeships starting at level 2 through to level 7. As an organisation we encourage further development of all employees to progress upward within their chosen field.

#### Diversity & Inclusion

A core principle of the Trust is to ensure that patients and staff are treated with dignity and respect. Promoting equality, diversity and human rights and challenging any form of inequality, discrimination, harassment or abuse are central to the Trust's Values. 'Committed to inclusion in everything we do' is the ambition set out in the Trust's Workforce Diversity & Inclusion Strategy.

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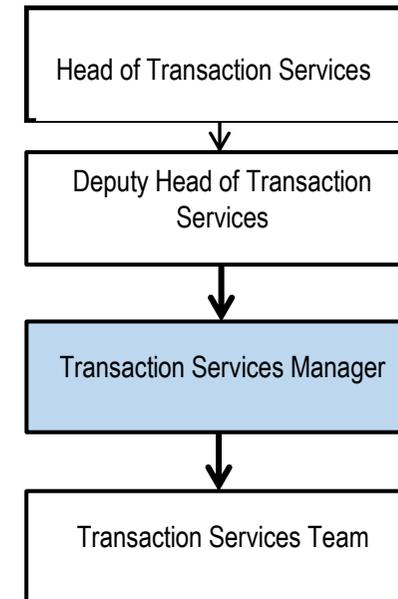
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### Main Duties and Responsibilities

1. Day to day management and supervision of team members, including recruitment of staff, training and development, absence and cover management, one to ones, conduct and performance concerns, team meetings and timely appraisals.
2. Planning the workload of the team on a daily, weekly, monthly and annual basis, ensuring all relevant key financial calendar targets are met and run smoothly (end of month, payment runs, etc.).
3. Produce reports to provide assurance around team performance including aged queries
4. Ensure all financial information is processed in accordance with the Trust's Standing Financial Instructions.
5. Monitor the quality of the service provided, ensuring that the required performance objectives are achieved.
6. Identify areas for improvement and work closely with the Transaction Services Manager to drive and implement agreed improvement initiatives. This may include proposing change to policies or procedures which impact both within the transaction services department and beyond.
7. Providing a point of escalation for queries for your team and personally dealing with complex queries, providing advice, training and guidance as required.
8. Support the team in accurately inputting and recording all financial data.
9. Ensure any necessary payments or debt collection happens accurately and on a timely basis.

### Organisational Structure



### Key Relationships

Divisional Finance Managers, Customers, Supplier, Financial Accounts, Management Accounts

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### Main Duties and Responsibilities Contd.

10. Ensure all internal and external letters are generated and issued in line with Trust policies.
11. Analyse complex and commercially sensitive financial information in order to identify errors and propose solutions to problems which may have a range of options in order to manage finance queries accurately and on a timely basis.
12. Communicate with any suppliers as necessary, including communication and resolution of sensitive or contentious issues.
13. Support, advise and develop team members in the resolution of queries.
14. Provide advice and guidance to finance and non-finance managers on complex financial matters, ensuring that everything is able to be clearly understood by those without financial training.
15. Monitoring and oversight of financial information including budgets and other financial initiatives critical to the smooth running of the transaction services department of the Trust.
16. Use specialist software to run predefined reports in order to provide information to Trust managers and other finance departments.
17. Investigate and escalate any issues found, seeking swift communication and resolution of issues.
18. Contribute to and participate in financial audit activity as required.
19. Confirm supplier bank details
20. Close sub-ledgers

This is not an exhaustive list of duties, and you may be asked to do other tasks within your work area.

### Additional post information

This post involves a significant amount of VDU work and advanced keyboard use in line with the inputting of financial data into databases and spreadsheets, where speed and accuracy are necessary

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Personal Profile - (E) = Essential (D) = Desirable

### Knowledge and Experience

- Experience of managing and maintaining all aspects of a computerised Purchase Ledger function within a large organisation (E)
- Experience of staff management (E)
- Evidence of previous experience within the NHS or a large business organisation (E)
- Experience of recruitment, selection, and training of staff (E)
- Experience of dealing with confidential and sensitive team member issues (E)
- Experience of handling and resolving all nature of team member issues in accordance with HR policies (E)
- Experience of working as part of a management team (D)
- Experience of liaising with internal and external auditors, other government agencies, and professional advisors, discussing and implementing agreed recommendations (E)

### Skills and Abilities

- Excellent communication and interpersonal skills (E)
- Ability to motivate, manage and team-build to optimise performance (E)
- Ability to work effectively with a flexible and adaptable approach (E)
- Ability to work in an organised manner (E)
- Ability to identify objectives and initiate action to achieve results (E)
- Ability to act in a resilient manner and work under pressure (E)
- Ability to frequently switch between complex tasks with no prior notice to meet demands of third party stakeholders (E)

### Aptitudes

- Committed, self-motivated, and able to act on own initiative (E)
- Respecting Everyone (E)
- Embracing Change (E)
- Recognising Success (E)
- Working Together (E)

### Qualifications and Training

- Degree in relevant qualification or equivalent experience (E)
- Evidence of CPD or qualification in transaction services or equivalent experience (E)
- Level 3 NVQ Customer Care and Management or equivalent experience (E)
- Evidence of previous management experience within the NHS or a large business organisation (E)

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### Transforming Care

Delivering sustainable healthcare services to our patients, which are effective, efficient and driven by excellence, is at the heart of our organisation. Transforming Care is the Trust's overarching programme of transformational change. It enables staff to use a structured approach to continuously improve and innovates their services, strengthen our capability, and deliver our Trust's mission to improve the health of the people we serve by delivering exceptional care, teaching and research, every day.

Our Quality Improvement Academy is open to all staff and leaders across the Trust, and provides training to lead or take part in improvement and transformation activities in their departments and across the Trust. We will support staff to develop the skills and tools to improve services to deliver the best care to our patients and public.

### Information Governance

It is the responsibility of all staff to respect the confidentiality of patients and staff, as specified in the Caldicott Principles, Data Protection Act 2018 and the Human Rights Act. It is the duty of every employee to:

- Only access person identifiable information as required in the execution of their duties.
- Disclose information appropriately, in line with the Data Protection Act 2018.
- To ensure good quality data by recording, promptly and accurately, clinical and non-clinical information within agreed timescales to PAS, the health record or the appropriate clinical or non-clinical information system
- Always trace patient notes on the Patient Administration System

Maintain the confidentiality of their passwords / usernames and if in possession of a 'Smartcard' abiding by the terms and conditions of its use.

### Workplace health and wellbeing

The Trust Workplace Health and Wellbeing Framework applies to all employees, students and volunteers who are encouraged to take responsibility for their individual health and wellbeing and to promote the wellbeing of colleagues. Line managers must recognise the importance of health and wellbeing and take it into account when planning tasks and designing jobs.

### Safeguarding Children and Vulnerable Adults

The Trust is committed to safeguarding and promoting the welfare of all children, young people and vulnerable adults, and as such expects all staff and volunteers to share this commitment.

### Quality and Clinical Governance

Quality in the NHS has three core dimensions: Patient Safety, Patient Experience and Clinical Effectiveness. Clinical Governance is about the systems, processes and behaviours to ensure that high quality services are provided to patients. Every member of staff has a role to play in striving for excellence: it is important that everyone is aware of and follows policies and procedures that govern their work; and if something goes wrong, everyone has an obligation to report it so lessons can be learned from mistakes, incidents and complaints. If any member of staff has concerns on any clinical governance matters, they should raise them with their line manager, professional adviser, or a more senior member of management. Reference should be made to the Trust's guidance on Raising Concerns about provision of patient care.

### Health and Safety

Under the provisions contained in the Health and Safety at Work Act 1974, it is the duty of every employee to:

- Take reasonable care of themselves and for others at work
- To co-operate with the Trust as far as is necessary to enable them to carry out their legal duty
- Not to intentionally or recklessly interfere with anything provided including personal protective equipment for Health and Safety or welfare at work.

Everyone has a responsibility for contributing to the reduction of infections.

Senior Management is responsible for the implementation throughout the Trust of suitable arrangements to ensure the health, safety and welfare of all employees at work and the health and safety of other persons who may be affected by their activities. Where health and safety matters cannot be resolved at Senior Management level the appropriate Executive Director must be notified.

Line Managers are responsible for the health and safety management of all activities, areas and staff under their control. This includes responsibility for ensuring risk assessments are completed and implementation of suitable and sufficient control measures put in place. Health and safety issues are dealt with at the lowest level of management practicable. Where health and safety matters cannot be resolved at a particular management level the appropriate Senior Manager must be notified.

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