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| Role | Finance Assistant | | |
| Standardised Job description code | GEN-03 | Grade | 5 |
| Role Purpose | | | |
| Manage day-to-day financial administrative activities in accordance with university financial controls, providing guidance and support to ensure accurate, efficient, and compliant financial operations. | | | |
| Grade Descriptors | | | |
| [high level core purpose commensurate with grade descriptor] =not to be edited | | | |

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| * Maintains oversight of processes, providing guidance and support to ensure efficient and accurate execution of tasks and adherence to policies and regulations. |
| * Takes responsibility for planning own tasks and efficiently organizes short-term projects or coordinates activities related to planning and reporting. |
| * Proposes improvements to procedures, interpreting customer needs, and often contributing to decisions impacting operations. |
| * Engages in daily communication and networking to cultivate professional relationships and facilitate the exchange of information. |
| * Communicates effectively, considering the audience and ensuring clarity and precision in conveying information and insights. |
| * Applies a practical understanding of procedures to identify and resolve technical or procedural challenges encountered. |

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| **CORE RESPONSIBILITIES [high level work which applies to multiple employees]** |
| Guidance on what can be changed can be found in the Toolkit for Managers & HR  Changes to core responsibilities must be checked and verified at local HR level to ensure edits are appropriate and remain within grade descriptor boundaries described above |
| * Deliver work in line with appropriate financial processes and procedures, ensuring updates are made in a timely manner and identifying opportunities for continuous improvement, including sustainable financial practices. |
| * Act as a point of contact, providing advice on financial procedures and policies, responding to enquiries in a timely manner. |
| * Contribute towards the development and implementation of departmental financial procedures to enhance operational efficiency and compliance. |
| * Prepare, run, and distribute financial reports regularly (weekly/monthly) to relevant stakeholders, ensuring accuracy and clarity of information. |
| * Maintain accurate financial records, updating systems/databases and checking for errors and resolving discrepancies. |
| * Oversee the processing of financial transactions, verifying figures, identifying anomalies, and resolving issues proactively. |
| * Gather, manipulate, and present financial data to support the preparation of annual budgets, forecasts, and management information. |
| * Ensure all financial transactions comply with the university’s financial regulations, funder terms and conditions, and external requirements, upholding transparency and accountability. |
| * Actively participate in process user groups and the university finance community to share knowledge, adopt best practices, and contribute to continuous service improvement. Support sustainable finance initiatives by identifying opportunities to embed cost-effective and environmentally responsible practices in financial administration. |
| * Foster positive, collaborative relationships within the team, university departments (including the central Finance Division), and with external suppliers to support smooth financial operations and promote a professional service image. |
| FOR PAYABLES POSTS (IF RELEVANT):   * Accurate checking of payments documents (e.g. invoices, payment request forms, expense claims) in line with the University's Financial Regulations, policies and processes, and any other requirements such as funder terms and conditions. * Ensuring that payments documents are complete, any relevant authorisations are in place, and that internal deadlines are met for payment to be made on time. * Efficient and accurate processing of invoices using Oracle Financials. (if relevant ie if dept processes its own invoices) * Promptly address any discrepancies and escalate complex issues through appropriate channels. * Use of management reporting to manage invoices carefully, tracking disputes and ensuring prompt resolution. |
| FOR PURCHASING POSTS (IF RELEVANT):   * Accurate checking of purchase requisitions to ensure purchases are completed in line with the University's Financial Regulations, policies and processes, and any other requirements such as funder terms and conditions. * Ensuring that purchase requisitions are complete and accurate and are processed promptly for purchases to be made in a timely manner using Oracle Financials. * Ensure that new supplier checks have been completed, raising any concerns through appropriate channels. * (If relevant) Ensure that deliveries are promptly checked and acceptance or returns are managed promptly via Oracle Financials. * Use management reporting to ensureie purchases are managed effectively and receipting is completed promptly. |
| FOR CASH HANDLING POSTS (IF RELEVANT):  Manage cash in line with the relevant guidance, for example ensuring receipts are issued promptly and that two people are involved in counting cash. |
| FOR ACCOUNTS RECEIVABLE POSTS (IF RELEVANT):   * Accurate checking of requests for sales invoices, ensuring that sales are completed in line with the University's Financial Regulations, policies and processes. * Liaise with the central team as needed to ensure that appropriate customer checks are completed. * Prepare sales invoices accurately, using Oracle Financials. * Use management reporting to manage sales involves. |
| Selection Criteria Essential [defined by SJD] |
| * Experience in a finance related role. * Recently qualified or working towards AAT or equivalent experience. * Excellent attention to detail and accuracy. * Able to work effectively collaboratively in a team environment. * Able to organise own workload and work to deadlines. * Excellent communication skills, with the ability to provide clear and helpful guidance on financial matters. * Experience in interpreting financial policies. * Good IT skills, including ability to use finance information systems and spreadsheets (e.g. Excel) to analyse data and efficiently produce clear and informative management information reports |

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| Desirable |
| * Knowledge and use of Oracle Financials. * Part qualified AAT |

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| Date |  |
| Edits to core responsibilities checked & verified against grade descriptor by {Departmental HR contact}: |  |