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**Coastal Medical Position Description**

**Company:** Coastal Medical

**Title:** Financial Analyst

**Reports To:** Manager of Contracting, Financial Analysis, and Strategy

**Supervises:** N/A Works on a team and in collaboration with others

**Job Summary:** Responsible for providing financial analysis of medical practice operations and effectively communicating results/improvement plans with stakeholders to ensure that operational performance plans are being adhered.

**Essential Functions of the Position (***Illustrative Examples Included***)**

* Financial modeling to gauge practice performance and provider productivity
* Supports annual budgeting process
* Analyzes results, monitors variances, identifies and investigates trends/changes and recommends actions to stakeholders
* Prepares meeting materials that are meaningful and clearly describe financial performance, possible solutions for improvement and recommended actions
* Prepares key financial analysis critical to the development of company-wide strategic initiatives
* Prepares monthly variance analysis of key organizational metrics
* Gathers information from various sources and makes presentations to different levels of senior management and other internal stakeholders
* Works collaboratively across departments as a finance resource
* Complies with federal and local confidentiality laws, including HIPAA, ensuring patient privacy
* Adheres to Coastal Medical guidelines and policies for protecting patients’ demographic, clinical and financial information
* Performs other job-related duties as assigned

**Education and Experience**

* Bachelor’s Degree in Finance, Accounting, or similar field
* Three years’ experience in Healthcare Finance, more specifically Medical Practice Finance or equivalent combination of education, training, and experience

**Knowledge, Skills and Ability**

* Proficiency in Microsoft Office products, with advanced skills in Excel
* Ability to perform complex financial data analysis
* Working knowledge of accounting terms and processes and with general and supporting ledgers
* Ability to communicate with stakeholders and summarize complex detailed financial information
* Ability to multi-task and operate under pressure with the skills to think critically and problem solve
* Ability to organize and prioritize work assignments
* Works well independently, with others and in teams
* Must be committed to providing superior customer service to all
* Excellent interpersonal and communication skills (both verbal and written) with the capability to effectively communicate with employees, patients, providers, insurance companies, etc.
* Must be flexible and receptive to change with the ability to learn quickly and retain new information
* Detail and process orientated with a focus on accuracy and efficiency

**Physical Effort and Dexterity**

* Sit and stand for prolonged periods of time
* Work and move among all departments of Coastal Medical group
* Excellent hand/eye coordination
* Lift up to 15 pounds
* Manual dexterity to operate a personal computer or laptop as well as standard office machines and equipment as it pertains to one’s position
* State-wide travel and operation of motor vehicle for offsite meetings and trainings
  + Must have a valid driver’s license and clear driving record
  + Use of personal vehicle and proof of auto insurance is necessary

**Visual Acuity, Hearing and Speaking**

* Capability to transfer information from original source to paper, computer, telephone and in person

*\*This position description does not list all duties of the position. The employee may be asked by his or her supervisor, manager, or director to perform other duties. The employee will be evaluated in part based on the performance of the tasks contained herein.*

**Signatures**

Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Human Resources: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Employee signature below constitutes employee's understanding of the requirements, essential functions, and duties of the position.*

Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Please Print)

Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*November 2021*