

University of Michigan Health System Finance Competency Model

Performance Planning & Staff Development



Version 1.2

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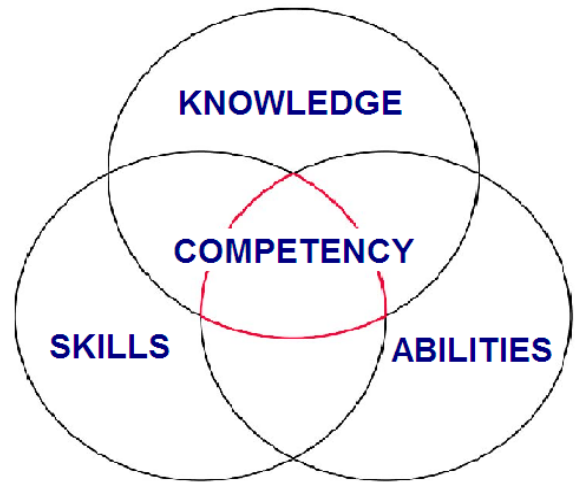
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Introduction to the Concept of Competency

What is a Competency?

A competency is a standardized requirement related to a set of certain knowledge, skills, and abilities (KSAs) utilized by an individual to successfully perform a specific job or task in a defined work environment. Competencies often serve as the basis for KSA standards and are potential criteria for measuring and assessing occupational performance.



What is a Competency Model?

A competency model is a collection of competencies that collectively describe successful occupational performance. It includes information about the KSAs required at different occupational levels and different levels of mastery. Competency models are the foundation for significant human resource functions such as recruitment, training and development, job descriptions, and performance reviews.

Why use a Competency Model?

Significant changes have been made in adapting occupational training to the trends of the market and the employment system. Technological innovations, new systems of organization, and changes affecting market structure necessitate the development of new and existing KSAs. The concept of competency reflects the evolution in the demand for professional qualifications, and the competency model is a tool that aids in this process of continual improvement.

How can the Competency Model be used to Develop Career Paths?

A career path may take many forms of education and experience. The competencies articulated in this model represent the foundation of UMHS Finance, and they must be addressed regardless of the individual's source of education or training. No matter the position, it can be tailored to each individual and should be utilized in a continuum of training and development in order to advance one's career.

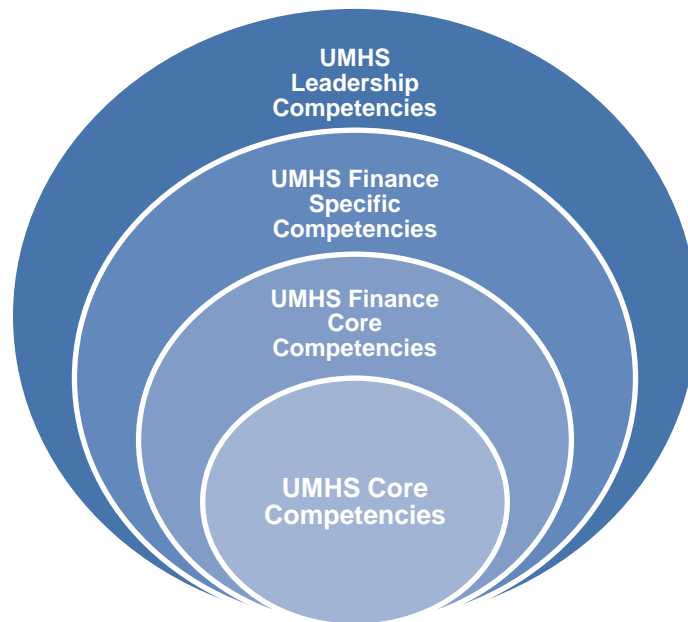
Competency Model Development

Model Framework

The framework of the University of Michigan Health System (UMHS) Finance Competency Model is a dynamic tool that is customizable to groups and individuals.

The UMHS Finance Competency Model is composed of several layers of competencies that build upon each other with increasing specialization of the content. The three tiers are as follows in increasing specialization: UMHS Core Competencies, UMHS Finance Core Competencies, and UMHS Finance Role Specific Competencies. An additional layer of Leadership Competencies applies to leadership across the Health System.

These layers represent competency areas that are built upon the knowledge, skills, and abilities essential to successful work performance. The following pages provide detail on each layer of competencies, including definitions, levels of proficiency within each competency, and key behaviors associated with each competency.



Proficiency Scale

There are three levels that pertain to the proficiency or mastery of a competency, as shown in the table below.

The key behaviors / descriptions of each level build upon the previous in an ascending numerical order from Level 1 (Basic) to Level 3 (Expert). In other words, to achieve a Level 2 rating on a particular competency, one must be proficient in the key behaviors of Level 1. To accomplish a Level 3 rating on a particular competency, one must be adept at the key behaviors of Levels 1 and 2.

Level	Description	Explanation
3	Advanced	Exercises a range of knowledge and skills for addressing complex situations, and is able to mentor or coach others on building a specific skill set.
2	Intermediate	Applies a range of knowledge or skills to routine and moderately complex situations, but may seek expert assistance in difficult or new situations
1	Basic	Possesses knowledge of and is familiar with concepts, but has not applied them to real situations and needs assistance beyond routine situations

Competency Model Key Terminology

Expression	Definition
Role	A role is a function performed by an individual; it is a grouping of targeted competencies. An individual's job may encompass one or more roles. Roles should not be interpreted as "titles."
Core Competency	A core competency is a set of knowledge, skills, and abilities that is essential to function as an effective member of UMHS Finance.
Specific Competency	A specific competency is a set of knowledge, skills, and abilities that is essential to perform a specific role in UMHS Finance.
Specialized Knowledge	Specialized knowledge is a high degree or specialized domain of knowledge, skills, tricks, shortcuts and rules-of-thumb that provide an ability to rapidly and effectively deal with situations in the specific area.
Proficiency Scale	There are 3 Levels that pertain to the proficiency or mastery of a competency. The key behaviors / descriptions of each level build upon the previous in an ascending numerical order from Level 1 to Level 3.

UMHS Finance Title Structure

	Official University Title	Working Title(s)
Financial Analyst Series	Financial Analyst Associate	Associate Reimbursement Analyst Associate Financial Reporting Analyst Associate Financial Analyst
	Financial Analyst Intermediate	Reimbursement Analyst Financial Reporting Analyst Financial Analyst
	Financial Analyst Senior	Senior Reimbursement Analyst Senior Financial Reporting Analyst Senior Financial Analyst
IT Series	Business Systems Analyst Intermediate	Business Analyst
	Business Systems Analyst Senior	Senior Business Analyst
	Applications Programmer Senior	Senior Applications Programmer
	Applications Programmer Lead	Lead Applications Programmer
Strategic/ Financial Planning Series	Strategic Planner Intermediate Health	Associate Business Consultant
	Strategic Planner Lead Health	Business Consultant
	Strategic Planner Expert Health	Senior Business Consultant
Administrative Support	Administrative Assistant Senior	Senior Administrative Assistant
Manager/ Director Series	Financial Senior Manager	Associate Manager Manager
	Financial Director Health	Director

UMHS Core Competencies

There are basic competencies required for all positions. A core competency is defined as a knowledge, skill, or behavior essential for one to function as an effective member of the University of Michigan. Following is a list of UMHS Core Competencies.

- **Ethics and Integrity:** Consistently demonstrates the organizations values through behaviors
- **Customer Service:** Consistently meets the organization's expectations for customer service, striving constantly to achieve them
- **Communication:** Effectively communicates verbally and in writing
- **Problem Solving:** Develops effective approaches, addresses needs, and solves problems
- **Flexibility:** Demonstrates flexibility in one's job roles, and manages change in ways that result in productive performance
- **Technology:** Uses available equipment and technology safely, efficiently and effectively
- **Safety:** Complies with safety instructions, observes safe work practices, and provides input on safety issues
- **Self-Management:** Maximizes own time and talents to achieve organizational goals
- **Seizes Opportunities:** seeks opportunities to innovate and continually improve
- **Change Resilience:** develops effective approaches for managing self through organizational change
- **Teamwork:** Works effectively with team/work group or those outside the formal line of authority to accomplish organizational goals
- **Cost effectiveness:** Prudently uses resources based on organizational priorities

"UM Health System - Human Resources: Basic Competencies." *University of Michigan Health System*. Web. 12 July 2010. <<http://www.med.umich.edu/umhshr/supervisor/basic-comptencies.html>>.

UMHS Finance Core Competencies

A core competency is a set of knowledge, skills, and abilities that is essential to function as an effective member of UMHS Finance. A core competency is a specific factor central to the way an organization and its employees work. Core competencies act as the fundamental basis of an organization's collective strength and cohesion. Following is a list of the UMHS Finance Core Competencies.

- **Teamwork:** Works cooperatively and productively with others to achieve results
- **Communication:** Clearly organizes and expresses information and ideas to meet the needs of the organization in an appropriate fashion
- **Technical Skills:** Understands and uses the appropriate equipment and / or technology to achieve the desired outcomes safely, efficiently, and effectively
- **Results Orientation:** The tendency to keep the desired end result of one's own or one's unit's work clearly in mind, by setting goals and focusing on them until they are achieved
- **Attention to Detail:** A concern for ensuring that work and information are complete and accurate, by preparing carefully for meetings and presentations, and following up with others to ensure that agreements and commitments have been fulfilled
- **Customer Service:** Effectively performs actions and provides assistance that focus on the needs of the customer and / or coworkers; develops and sustains productive customer relationships
- **Analytical and Problem Solving Skills:** The ability to seek information from a variety of sources and in a variety of ways, to clarify situations and to facilitate effective planning, decision-making, and problem solving
- **Influence Skills:** The ability to gain others' support for ideas, proposals, projects, and solutions, through logical argument, appeal to others' interests, and a variety of other indirect strategies
- **Interpersonal Awareness:** The ability to notice, interpret, and anticipate others' concerns and feelings, and to communicate this awareness empathetically to others
- **Self-Management:** Performs independently with minimal oversight to achieve organizational and institutional goals while conducting all aspects of the job in accordance with prescribed regulations and guidelines; employs a sense of honesty and truthfulness in regards to the motivations for one's actions (ethics & integrity)
- **Professional and Technical Knowledge:** Understanding and utilizing policies, procedures, technology, regulations, stakeholder interests, as well as economic, financial, and industry data to accurately diagnose and identify key issues, when developing strategies and plans

- **Industry Knowledge:** Knowledge of the healthcare, research, and higher education industries; understanding of trends, familiarity with key competitors, markets and policies, and fluency in specific terminology and business practices
- **Organizational Knowledge:** An understanding of the Health System's mission, various stakeholder groups, and organizational structure

UMHS Finance Specific Competencies

A specific competency is a set of knowledge, skills, and abilities that is essential to perform a specific role in UMHS Finance. Following is a list of the UMHS Finance Specific Competencies.

- **Financial Analysis Acumen:** The ability to apply the concepts used to make economic decisions, key accounting, financial, analysis or investment valuation concepts used in operating activities
- **Strategic Planning Acumen:** The general understanding of business principles and the ability to leverage internal and external information to make thoughtful business decisions about the future of the organization quickly and successfully
- **Accounting and Financial Statements:** The knowledge and understanding, of technical accounting duties involving how an organization records transactions and reports accounting data and the ability to prepare, review, and correct the accuracy of journal entries, income statements, balance sheets, consolidated statements, and various other financial documents or reports
- **Reimbursement Acumen:** The ability to apply knowledge of reimbursement principles and regulations for filing annual 3rd party cost reports and computing monthly contractual adjustments
- **Data Extraction, Transformation & Loading:** The ability of database usage and especially in data warehousing that involves: extracting data from outside sources, transforming it to fit operational needs and loading it into the end target
- **Programming and IT Environments & Systems:** The ability to design, develop, implement, support or manage computer programs and information environments and systems
- **Project Management:** A concern for ensuring that everyone involved in a project understands what is to be done, why, how, when, and by whom

Teamwork

Definition	Level 1	Level 2	Level 3
<p>The ability to get groups to work together cooperatively, by enlisting active involvement, creating a climate of respect and openness, and applying effective techniques for group facilitation</p>	<ul style="list-style-type: none"> • Actively participates • Works cooperatively with others • Shares information as appropriate • Volunteers to help when needed • Prepares in advance to contribute • Demonstrates respect for all team members 	<ul style="list-style-type: none"> • Remains focused on team goals • Promotes cooperation with other work units, including those across organizational boundaries • Values input and know-how from all participants • Ensures that all team members are treated fairly and objectively • Resolves conflict in a positive manner 	<ul style="list-style-type: none"> • Shares credit for team accomplishments • Creates a climate of honest, constructive feedback • Uses group facilitation methods and techniques (e.g., for idea generation and group decision making) • Models solid team conflict resolution skills • Helps the team evaluate its effectiveness

Communication

Definition	Level 1	Level 2	Level 3
<p>Clearly organizes and expresses information and ideas to meet the needs of the organization in an appropriate fashion</p>	<ul style="list-style-type: none"> • Expresses facts and thoughts in writing and orally in a clear and concise way • Recognizes information that is material to others and informs them as appropriate • Communicates with tact and sensitivity 	<ul style="list-style-type: none"> • Demonstrates good listening skills • Communicates technical content in a way that contributes toward understanding • Invites response and feedback • 	<ul style="list-style-type: none"> • Effectively presents to large and/or varied groups • Ability to write persuasively • Promotes cooperation and trust of sharing ideas • • Able to articulate highly complex material in writing and verbally in an understandable manner

Results Orientation

Definition	Level 1	Level 2	Level 3
<p>The tendency to keep the desired end result of one's own or one's unit's work clearly in mind, by setting goals and focusing on them until they are achieved</p>	<ul style="list-style-type: none"> • Sets challenging but achievable goals • Focuses efforts on highest priorities • Sets clear goals and objectives for meetings and projects 	<ul style="list-style-type: none"> • Demonstrates a strong sense of urgency about solving problems and getting work done • Maintains persistence in the face of obstacles and frustrations • Manages multiple projects and assignments, making appropriate prioritization decisions 	<ul style="list-style-type: none"> • Understands how to adjust plans and re-prioritize when needed • Develops a different approach, when necessary to complete the project on schedule or with the available resources

Attention to Detail

Definition	Level 1	Level 2	Level 3
<p>A concern for ensuring that work and information are complete and accurate, by preparing carefully for meetings and presentations, and following up with others to ensure that agreements and commitments have been fulfilled</p>	<ul style="list-style-type: none"> • Focuses on the details of a project • Comes prepared for meetings and presentations • Develops and uses systems to organize and keep track of information or work progress 	<ul style="list-style-type: none"> • Regularly tracks progress against planned schedule and budget • Ensures appropriate documentation that explains methodology and assumptions 	<ul style="list-style-type: none"> • Develops contingency plans and plans to prevent possible problems • Follows up regularly with team members, customers, and others outside of the project team, to ensure that the project is progressing according to plan

Customer Service

Definition	Level 1	Level 2	Level 3
<p>Effectively performs actions and provides assistance that focus on the needs of the customer and / or coworkers. Develops and sustains productive customer relationships.</p>	<ul style="list-style-type: none"> • Develops effective customer relationships • Timely response to customer requests • Follows up to ensure customer satisfaction • Reflects a positive orientation • Anticipates and meets customer needs • Demonstrates flexibility 	<ul style="list-style-type: none"> • Resolves customer conflicts in a positive manner • Identifies and surfaces customer concerns requiring broad resolution • Independently resolves complex customer service issues • Regularly meets or exceeds customer expectations 	<ul style="list-style-type: none"> • Effectively negotiates desired customer outcomes • Displays initiative in creating innovative customer value • Demonstrates cultural competence

Analytical and Problem Solving Skills

Definition	Level 1	Level 2	Level 3
<p>The ability to seek information from a variety of sources and in a variety of ways, to clarify situations and to facilitate effective planning, decision-making, and problem solving</p>	<ul style="list-style-type: none"> • Identifies the specific information needed to clarify a situation or make a decision • Listens carefully to provided information and asks clarifying questions • Helps organize and manipulate data to identify/explain trends and problems and their causes • Accurately determines necessary sequence of activities needed to achieve goals • Uses sound rationale for problem identification and decision making • Looks for root causes, not just symptoms of the problem • Determines valid premises for arriving at conclusions prior to action • Identifies potential negative consequences of actions 	<ul style="list-style-type: none"> • Identifies a set of parameters to take into account in analyzing a situation or making a decision • Goes beyond the initial findings and takes steps to check multiple sources interpret various types of data • Effectively uses questions, probing and interviewing to obtain unbiased information • Appropriately uses metrics and understands the information's impact on decision-making • Skilled at recognizing latent and underlying meaning • Demonstrates a strong analytical and story-telling ability • Visualizes and articulates the inter-relationships of various types of data from various sources • Has the ability to influence others with the use of data and the presentation of their analysis 	<ul style="list-style-type: none"> • Analyzes data, draws conclusions, and proposes potential solutions and best practices • Demonstrates tenacity and creativity when working with data to create a high quality work output / deliverable • Seeks the perspective of all stakeholders involved in a situation • Creates visuals of complex data to communicate in terms anyone can understand and to tell a compelling story • Weighs the costs, benefits, risks, and chances for success, in making a decision • Provides expertise and direction in the design and testing of analytical processes • Effectively explores alternatives and established positions to reach agreements and solutions that gain the support and acceptance of all parties • Makes decisions, takes actions, and chooses options being mindful of the potential impact on the organization, the customer, or the team

Influence Skills

Definition	Level 1	Level 2	Level 3
<p>The ability to gain others' support for ideas, proposals, projects, and solutions, through logical argument, appeal to others' interests, and a variety of other indirect strategies</p>	<ul style="list-style-type: none"> • Presents several different arguments in support of a position • Builds relationships with others who may be able to provide information, resources, or assistance • Presents data or educates people about the constraints of a problem, in order to persuade 	<ul style="list-style-type: none"> • Involves others in a process or decision, to ensure their support • Identifies and targets influence efforts at the real decision makers and those who can influence them • Enlists experts or third parties to influence others 	<ul style="list-style-type: none"> • Offers trade-offs or exchanges, to gain commitment • Orchestrates a group decision or result, by first meeting individually with the key decision makers to gain their support • Carefully frames issues and alternatives before seeking decisions or assistance from senior management • Identifies and proposes win-win solutions

Interpersonal Awareness

Definition	Level 1	Level 2	Level 3
<p>The ability to notice, interpret, and anticipate others' concerns and feelings, and to communicate this awareness empathetically to others</p>	<ul style="list-style-type: none"> • Notices and accurately interprets what others are feeling, based on their choice of words and tone of voice • Takes time to get to know people personally 	<ul style="list-style-type: none"> • Notices and accurately interprets what others are feeling, based on their expressions and other nonverbal behavior • Asks questions to draw out others' concerns • Is responsive to others' comments 	<ul style="list-style-type: none"> • Restates others' concerns, to demonstrate understanding • Understands both the strengths and weaknesses of others • Finds non-threatening ways to approach others about sensitive issues

Self-Management

Definition	Level 1	Level 2	Level 3
<p>Performs independently with minimal oversight to achieve organizational and institutional goals while conducting all aspects of the job in accordance with prescribed regulations and guidelines. Employs a sense of honesty and truthfulness in regards to the motivations for one's actions (ethics & integrity).</p>	<ul style="list-style-type: none"> • Works with appropriate level of supervision • Timely completion of assignments • Demonstrates responsible behavior • Disagrees in a respectful manner 	<ul style="list-style-type: none"> • Works independently • Resolves issues with minimal supervision • Identifies and invests time in learning new skills and mastering core work functions • Admits mistakes and initiates corrective courses of action • Seeks opportunities of more responsibility • Shows initiatives in preparing for upcoming projects • Uses appropriate techniques to gain acceptance of ideas and plans 	<ul style="list-style-type: none"> • Demonstrates accurate self-assessment • Modifies own behavior to accommodate tasks, situations, and individuals • Shows resilience in managing change • Pursues continuous learning • Identifies effective strategies for balancing competing institutional perspectives • Models self regulation and adaptability • Champions productive change within the workplace

Industry Knowledge

Definition	Level 1	Level 2	Level 3
<p>The knowledge about a specific industry, technology and/or market, typically based on extensive experience in that industry.</p>	<ul style="list-style-type: none"> • Basic knowledge of health care systems, higher education institutions, and biomedical research • Familiarity with industry terminology and business practices • Familiar with the key sources of revenue, types of expense and key metrics used to measure financial performance • Fluency in industry terminology and business practices in one or more of the Health System's missions 	<ul style="list-style-type: none"> • Maintains a current awareness of relevant economic, social, and political trends • Ability to use industry knowledge for planning and performance accomplishments • Familiarity with key industry players and influencers 	<ul style="list-style-type: none"> • Proactively gathers information on competitive landscape • Fluency in industry terminology and business practices in at least two of the three Health System missions • Shares expert industry knowledge with internal and/or external audiences

Organizational Knowledge

Definition	Level 1	Level 2	Level 3
<p>An understanding of the Health System's mission, various stakeholder groups, and organizational structure</p>	<ul style="list-style-type: none"> • Understands the Health System's mission, vision, and values • Familiar with the overall governance, leadership and departmental structure of the Health System units and university 	<ul style="list-style-type: none"> • Possesses knowledge of the Health System's strengths and weaknesses that are likely to impact the Health System's ability to perform • Displays understanding of multiple constituency groups and works to improve collaboration between groups for the greater effectiveness of the Health System • Familiar with the Health System's and university's resources and pockets of expertise in various areas 	<ul style="list-style-type: none"> • Knowledge of strategic partners and alliances. • Understands and leverages the formal and informal structure or hierarchy of the organization/unit

Professional and Technical Knowledge

Definition	Level 1	Level 2	Level 3
<p>Understanding and utilizing policies, procedures, technology, regulations, stakeholder interests, as well as economic, financial, and industry data to accurately diagnose and identify key issues, when developing strategies and plans</p>	<ul style="list-style-type: none"> • Understands what information and data is available for managing work processes and how to obtain it • Understands key components of financial business functions, their interactions with the institution, and their application • Demonstrates sound ability to apply appropriate technical resources 	<ul style="list-style-type: none"> • Demonstrates understanding of advanced technical resources • Demonstrates understanding of how the organization, program, work process, or department can improve • Displays accurate assessment of risk • Uses knowledge of business functions to create positive change in the organization • Takes action that demonstrates consideration for stakeholder interests 	<ul style="list-style-type: none"> • Same as level 2, with the difference being the degree of understanding and knowledge

Financial Analysis Acumen

Definition	Level 1	Level 2	Level 3
<p>The ability to apply the concepts used to make economic decisions, key accounting, financial, analysis or investment valuation concepts used in operating activities</p>	<ul style="list-style-type: none"> • Knowledge of corporate finance and investment fundamentals and techniques (e.g., ROI, NPV, investment evaluation, etc.). • Ability to gather, evaluate data from various systems. • Analyze data, prepare an operational analysis • Combine pieces of information to form conclusions • Communicate effectively 	<ul style="list-style-type: none"> • Possesses considerable ability to apply corporate finance and investment knowledge and techniques to moderately complex situations • Ability to deploy corporate finance and investment fundamentals and techniques • Ability to put together moderately complex financial models and explain predications • Identifies complex problems and review related information to develop and evaluate options. • Understanding of and ability to prepare capacity and productivity analyses • Communicates effectively in writing and presentation 	<ul style="list-style-type: none"> • Possesses deep, specialized ability to apply corporate finance and investment knowledge and techniques to complex models, analyses, and other situations • Subject matter experts on data, analysis and systems, coach/mentor others on best practices • Lead the implementation and evaluation of statistical models and analyses • Work with departments on complex issues and recommend options and have an active role in implementation • Ability to present analysis and models to leadership groups and individuals

Strategic Planning Acumen

Definition	Level 1	Level 2	Level 3
<p>The general understanding of business principles and the ability to leverage internal and external information to make thoughtful business decisions about the future of the organization quickly and successfully</p>	<ul style="list-style-type: none"> • Knowledge of strategic frameworks, business plan development, and implementation processes • Consistently identifies and fills gaps in information required to understand strategic issues • Compares and combines information to identify underlying issues • Sees associations between seemingly independent problems or events to recognize trends, problems, and possible cause-effect relationships 	<ul style="list-style-type: none"> • Develops business plans for ancillary services (e.g., sources of capital, core operations, etc.) • Evaluate whether a proposed solution aligns with the organizational business plan • Generates and considers extensive options for actions to achieve a long-range goal or vision • Identifies key tasks and resources needed to achieve objectives • Guides others in developing decision criteria considering factors such as cost, benefits, risks, and timing 	<ul style="list-style-type: none"> • Participates in organizational strategic planning • Develops and monitors strategic and tactical objectives • Selects the strategy / process most likely to succeed • Makes sure actions are carried out according to plan; consistently monitors results and makes adjustments as needed

Accounting, Auditing, Financial Statements

Definition	Level 1	Level 2	Level 3
<p>The knowledge and understanding of technical accounting duties involved in recording, reporting, auditing and interpreting financial transactions. This includes the ability to prepare, review, and correct the accuracy of journal entries, income statements, balance sheets, consolidated statements and various other financial reports or documents, according to generally accepted accounting principles (GAAP).</p>	<ul style="list-style-type: none"> • Possess working knowledge of financial statements and accounting practices. • Maintain routine financial data, following standardized methods and procedures. • Verify and ensure the accuracy and validity of moderately complex transactions and examine financial statements / accounting records. • Ability to identify unusual variance in account balances. • Understands the importance of and level of responsiveness required for an audit. 	<ul style="list-style-type: none"> • Prepare, monitor and manage financial accounts for completeness, accuracy, and compliance with accepted standards, regulations, and program laws. • Process a variety of transactions which may require considerable financial knowledge. • Apply technical knowledge of financials to create and maintain packages and presentations. • Ability to independently obtain the necessary information from departments in order to explain variances in account balances. • Identifies information / areas auditors will examine. • Effectively communicates with auditors, resolving standard issues and elevating complex matters to management. • Demonstrates ability to apply knowledge of 3rd party regulations. 	<ul style="list-style-type: none"> • Apply thorough knowledge of accounting methods, procedures, and accounting practices; may have basic knowledge of the principles of a specialized accounting field or program • Supervises various financial functions of moderate to considerable complexity • Interpret, prepare and present financial data and variance explanations to internal and external stakeholders • Consistently demonstrates an understanding of the relationship between operational activity and financial results. • Is often approached as a technical accounting resource to others. • Design and implement work plan for onsite audits. • Can effectively present our position on various accounting and auditing standards to internal and external auditors.

Reimbursement Acumen

Definition	Level 1	Level 2	Level 3
<p>Acquiring knowledge of reimbursement principles and the associated regulations and contract provisions; ability to apply this knowledge in all phases of the settlement cycle and for multiple payers, for the purpose of ensuring that net revenue is correct, compliant, received timely and accurately recorded.</p>	<ul style="list-style-type: none"> • Possesses working knowledge of important reimbursement fundamentals including: <ul style="list-style-type: none"> - components of revenue for major payers and how they are calculated - interim payments - settlement phases - cost report logic, inputs, outputs - accounting structure and flow • Ability to define data needs and extract data from multiple financial systems • Maintains currency with major changes in regulations, rules and contracts 	<ul style="list-style-type: none"> • Possesses comprehensive knowledge of important reimbursement fundamentals • Possesses in-depth knowledge of multiple specialty areas • Ability to research manuals, contracts, and regulations and utilize the findings • Ability to identify expected outcomes and variances from the expected; ability to research and explain variances 	<ul style="list-style-type: none"> • Possesses in-depth knowledge in the most complex specialty areas • Ability to review new rules and regulations and understand the impact on our Health System • Ability to interpolate and synthesize rules and regulations when, as is often the case, the guidance is vague or inconsistent • Resource to others through the organization for complex reimbursement issues and advice • Mentors and teaches reimbursement staff and others • Develops positions and advocates or negotiates for UMHS

Data Extraction, Transformation & Loading

Definition	Level 1	Level 2	Level 3
<p>The transformation of any data source into a form useful to the operational needs of the organization.</p>	<ul style="list-style-type: none"> • Understands data files, relational data base concepts, caching • Demonstrates ability to construct simple reports • Ensures accuracy of data through financial tie-out • Demonstrates ability to construct moderately complex reports 	<ul style="list-style-type: none"> • Writes ETL processes and procedures to move data between disparate systems • Demonstrates ability to resolve issues associated with ETL • Demonstrates ability to export data to disparate systems using multiple techniques • Verifies accuracy of data across multiple financial dimensions • Demonstrates ability to construct complex reports • If necessary, defines new subject areas in a data repository • Proficient in writing database query language (SQL) 	<ul style="list-style-type: none"> • Provides data architect role in present and future system-wide ETL requirements • Understands all data environments contributing to Finance's mission • Understands financial data University-wide and its interrelationships • Evaluates new reporting tools • Provides process improvement initiatives in relation to the data and the team

Programming and IT Environments & Systems

Definition	Level 1	Level 2	Level 3
<p>The ability to design, develop, implement, support or manage computer programs and information environments and systems</p>	<ul style="list-style-type: none"> • Aware of different IT environments and able to function in at least one • Possess knowledge of batch scripting and general knowledge of online programming • Possesses knowledge of some utility functions • Possesses beginners' knowledge in one or more programming languages used in finance • If necessary, provides simple web-based program modules 	<ul style="list-style-type: none"> • Comfortable with all environmental components contributing to organization's mission • Demonstrates ability to perform utility tasks in all • Resolves issues as they relate to finance applications • Works with technical infrastructure providers on a regular basis to proactively prevent system problems • Proficient in two or more programming languages used in finance • Programs complex tasks in one programming language • If necessary, provides complex web-based program modules • Mentors junior team members 	<ul style="list-style-type: none"> • Proficient with all environmental components contributing to organization's mission • Demonstrates ability to write large and complex programs • Provides leadership and vision for systems and technical environments • Proficient in all programming languages used in finance • Mentors all team members in all languages • Provide process improvement and recommendations as it relates to technical and Finance departmental needs

Project Management

Definition	Level 1	Level 2	Level 3
<p>Ensures that everyone involved in a project understands what is to be done, why, how, when, and by whom</p>	<ul style="list-style-type: none"> • Contributes to defining and planning the project scope • Creates, displays, and regularly updates an overall project schedule • Organizes work, sets priorities, and determines resource requirements • Coordinates with other staff within the organization to accomplish goals 	<ul style="list-style-type: none"> • Clarifies the roles and responsibilities of everyone involved in the project • Identifies stakeholders, their objectives and gains their approval for the scope of work • Determine measures to track project progress and quality of work • Ensures that various groups involved in a project communicate what they are doing together and to others who need to know • Monitors and evaluates the project's progress with respect to milestones and timelines 	<ul style="list-style-type: none"> • Negotiates clear definitions and limits on deliverables and work to be done • Holds team meetings to review the overall project plan and schedule and clarify any questions about expectations of all team members • Holds meetings to pull together subgroups working on different parts of a project, to discuss and resolve any differences about tasks, approaches, responsibilities, etc. • Continually keeps stakeholders informed about progress on the project

UMHS Finance Super-specialized Knowledge

Super-specialized knowledge is a high degree or specialized domain of knowledge, skills, tricks, shortcuts and rules-of-thumb that provide an ability to rapidly and effectively deal with situations in the specific area. The following is a list of the specialized knowledge contained in UMHS Finance:

- **FAM**
- **Tuition**
- **Cost Reports**
- **Audit**
- **Etc...**