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CAREER PATH TO DATE

After graduating from university, I began working in the finance department of a small charity. I progressed from being finance assistant to junior management accountant. During the COVID19 pandemic, the NHS became the focus of the public attention in the UK as they played a significant role in treating those who became unwell as well as containing the spread of the virus. I was furloughed during lockdown, and as a result, I had more time to study for my CIMA exams and to reflect on my career to date. I set out a plan to join a bigger organisation for a fresh challenge towards the end of the pandemic. I felt inspired by the bravery and dedication shown by the frontline clinical staff. I wanted to go beyond just 'clapping for the NHS'. I began to research about finance roles in the NHS to explore if there are any opportunities for me to make a positive contribution to this organisation.

Towards the end of 2021, my NHS finance career had begun when I was offered the role of management accountant within the income team at East and North Hertfordshire NHS Trust (ENHT). Transitioning from working in a small charity with fewer than 50 staff members to a Trust employing over 6,000 people was overwhelming at first. There were a lot of NHS specific terminologies and abbreviations (jargons) to learn, then of course many new faces and names to remember.

The team around me was very supportive. As I was settling into the income team, I was given time to develop background knowledge of various aspects of NHS finance e.g. funding flow in the NHS ecosystem, how the national tariff is set and how services are commissioned etc. I would recommend HFMA's introductory guide to NHS finance as a useful starting point for anyone who is new to the NHS.

I mainly worked with Excel, Power BI, QlikView and the service level agreement monitoring (SLAM) database which is used for pricing activities. QlikView is the trust wide reporting suite whilst income team maintain dashboards in Power BI for trend and variance analysis.

There were two key monthly deadlines for the income team. The first one was internal reporting where an income position had to be finalised by end of working day 3, so it could form part of the wider trust monthly digest. The second deadline was the commissioners (now integrated care boards) and NHSE submission where we had to submit actual activity data for the trust to be paid for services delivered.

Most of my work was centred around validating activity data and ensuring that the external submission deadline was met. There were also some journals which had to be processed for internal month end reporting. Inconsistencies in activity data were highlighted and resolved with the data quality team. Activity data was then summarised through data tables and charts in dashboards. This information was then presented as part of monthly performance and activity review meetings with operational managers and data quality colleagues.

Over time, I had developed new charts and tables within SLAM QlikView reports based on users' feedback. I also built detailed procedure notes so knowledge can be shared across the team. For the Power BI reports, I mainly used them to check for any unexpected movement in activity or income when archiving the previous month's pricing model. It was also used during internal reporting cycle to identify which point of delivery (POD) had significant change in income compared to previous months. Again, any large movement was investigated alongside our data quality or coding colleagues before being escalated to operational managers.

For activities outsourced to private sector providers, I carried out regular reconciliations between our internal activity record and backing data provided alongside invoices received to ensure the trust were invoiced correctly. Differences identified were flagged to operational managers or clinical coding team for further investigation.

In 2022, there was a restructure within the costing team which resulted in a new finance analyst role being created. Analytical skills are becoming more important as NHS providers have an ever-increasing amount of data that could influence decision making in improving patient care. I was intrigued by the role as it requires a mix of financial management and data analytics skills. Having discussed the role with the hiring manager and my line manager at the time, I applied for this newly created role and was successful. Overall, I worked in the income team for about 10 months before I was appointed finance analyst in the costing team.

In my role as costing finance analyst, I have been producing monthly service line reports (SLR) for service managers to review. This involves refreshing and validating clinical support activity data, refreshing ledger position so it is aligned with the trust's management accounts. Once all input data is finalised, I prepare commentary for service lines to highlight any significant variances from plan and the likely causes for them.

I have supported my manager with delivering SLR training to finance colleagues and operational staff. Based on users' feedback, I have developed various new features in the SLR QlikView dashboard. I have added a new year on year trend for clinical resources, e.g. pathology tests, so users can understand the main drivers behind clinical cost variances. I have also built an interactive learning module about SLR which is accessible by all trust staff on the trust's learning platform.

Looking ahead, having recently passed CIMA Strategic Level E3 module, I am aiming to make further progress towards completing my remaining CIMA objective tests this year. In my role as finance analyst, my focus would be to engage more with clinicians and operational colleagues with the use of SLR and getting more involved with the preparation ahead of NHSE's National Cost Collection. At ENHT, I have been encouraged to attend regional and national conferences virtually to keep up to date with changes in the wider NHS. This is in addition to training courses for softer skills that I have attended such as communication skills and time management. Recently, several initiatives have been within the Trust to identify skill gaps and work shadowing opportunities across different teams within the finance and information functions.