

1. General Information

Position Title:	Finance Assistant
Division/Department:	Corporate, Finance
Position Reports to:	Finance Manager - Academic & Medical Services / Research
Enterprise/Individual Agreement:	Individual Agreement
Classification/Grade:	N/A
Location:	Epworth Corporate
Resource Management (for Management positions only) Number of Direct Reports: Budget under management:	N/A
Key Relationships - internal and external	<p>Internal:</p> <ul style="list-style-type: none"> • Finance and Business Services • Epworth Medical Foundation staff • Research investigators, research staff • Epworth Office for Research <p>External:</p> <ul style="list-style-type: none"> • Research collaborators and partners (e.g. CROs and sponsors) • External hospitals, clinics, laboratories and diagnostic centres • External suppliers

2. Overview of Epworth HealthCare

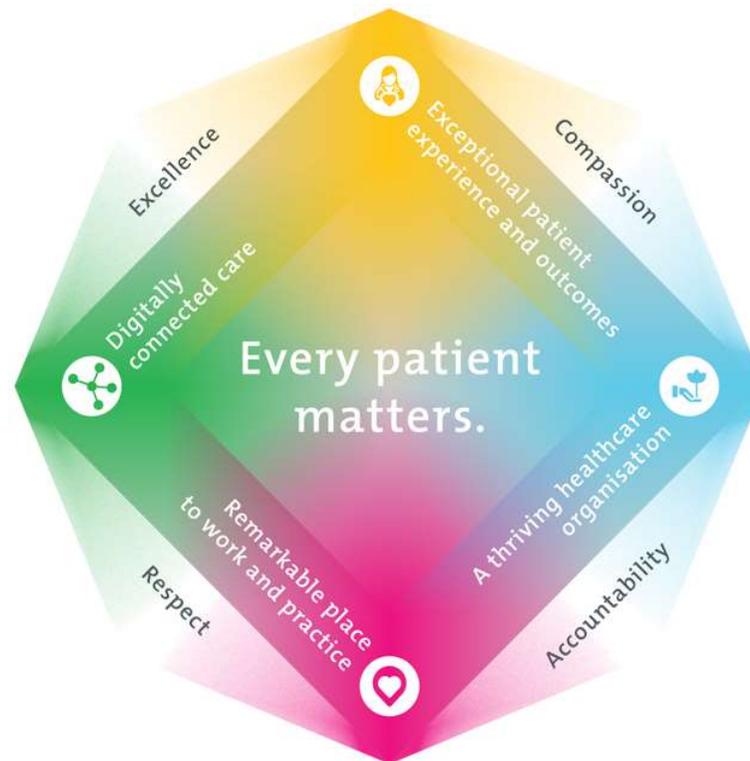
Epworth HealthCare is Victoria's largest not-for-profit private health care group, renowned for excellence in diagnosis, treatment, care and rehabilitation. Epworth is an innovator in Australia's health system, embracing the latest in evidence-based medicine to pioneer treatments and services for our patients.

Epworth's values define our approach and our delivery. We pride ourselves on communicating our values and delivering on them in a real and meaningful way. Our Values are Compassion, Accountability, Respect and Excellence. More information can be found on the [Epworth website](#).

Epworth's purpose is Every Patient Matters.

Our Vision is Delivering another 100 years of exceptional healthcare and innovation to the Victorian community.

3. Epworth HealthCare Strategy



All roles are linked to the Epworth strategy and are fundamental in achieving its vision and purpose.

Exceptional patient experience and outcomes - To empower our patients and deliver compassionate, expert and coordinated care.
A thriving healthcare organisation - To adapt and grow in a changing healthcare landscape by delivering a unique private not-for-profit healthcare organisation.
Remarkable place to work and practice - To ensure Epworth is an outstanding place to work and practice through a culture of care and investment in our people.
Digitally connected care - To innovate and improve the digital experience, interactions and outcomes for our patients, staff and doctors.

4. Purpose of the Position

Under the direction and guidance of the Finance Manager – Academic & Medical Services, the Finance Assistant will be responsible for the preparation and reporting of various financial requirements related to the Epworth Medical Foundation. They will also be responsible for ensuring Research related expenditure is effectively processed, tracked and managed, and that all expenditure is appropriately verified by relevant research staff members prior to any payment approval.

5. Clinical Governance Framework

This role is required to put into practice the Clinical Governance Framework at Epworth as every employee is accountable for ensuring that our patients and community receive safe, high quality and person-centred care in every interaction with Epworth. This is achieved through active participation in the five domains of clinical governance at Epworth:

Clinical Governance Domain	Role
Leadership and culture	Promote and participate in a supportive, fair and transparent culture where lessons from previous outcomes are learned and patient safety and quality is a priority at all levels of the organisation.
Consumer Partnerships	Understand and where relevant, ensure that each patient is actively involved in their own care and treatment including families/carers wherever possible.
Effective Workforce	Develop and maintain one’s own competency, skills and knowledge to ensure high quality service provision and care.
Clinical Safety and Effectiveness	Understand and where relevant, ensure, that the right care is provided to the right person at the right time, in the right place and patient outcomes are monitored and improved.
Risk Management	Be responsible for identifying and reporting risks, hazards and near misses for people in our care and participating in risk mitigation strategies.

6. Key Accountabilities

KEY RESPONSIBILITIES	MEASURES/KPIs TO BE ACHIEVED
<p>Epworth Medical Foundation Financial Coordination & Reporting:</p> <ul style="list-style-type: none"> • Generate and analyse financial reports for end of month and quarterly reporting • Prepare financial data for Board of Directors & Board of Trustees reports • Update the Finance Manager on financial matters relevant to income and expenditure • Manage Capex from donated funds • Reconciliation of bank statements to Donation Analysis • Coding and processing invoices, and tracking requisitions through the finance system • Term deposit monitoring and reporting • Management and reconciliation of endowment funds • Major gift pledge reporting per month • Management of expense budget • Liaising with the finance team for accounting queries • Liaising with Epworth staff members regarding funding balances and reimbursement requests • Continually improve and update financial systems & procedures 	<ul style="list-style-type: none"> • Financial data and reports are completed within monthly/quarterly/annual timeframes as outlined by the Finance Manager • Accuracy of reports and compiled data • Ensure identification of any issues/potential issues are escalated to the Finance Manager in a timely manner
<p>Research Financial Coordination & Reporting:</p> <ul style="list-style-type: none"> • Processing of Research related financial transactions, including invoicing, vendor payments, and patient reimbursements • Processing of accounts receivable requests related to clinical trials and research activity, including assistance with debt recovery as required. 	<ul style="list-style-type: none"> • Timely and accurate processing of invoices and research related expenditure • Timely response to research financial related queries • Ensure identification of any issues/potential issues are escalated to the Finance Manager in a timely manner

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<ul style="list-style-type: none"> • Liaising with research staff for their review and confirmation of the validity of invoices and expenditure • Maintain tracking logs for research and clinical trial invoices • Assist in preparation of annual research project acquittals • Prepare mid-level financial reports and variance analyses, escalating issues to the Finance Manager as required. • Respond to/escalate research staff queries that are financial in nature 	
<p>Customer Service</p> <p>Epworth is committed to the provision of excellent customer service to all of our people, customers and stakeholders including patients and external suppliers.</p> <p>Superior patient service leads to improved healing in a trusting, caring environment and creates a safe environment for patients and employees.</p> <ul style="list-style-type: none"> • Provide excellent, helpful service to patients, visitors and staff • Communicate with clear and unambiguous language in all interactions, tailored to the audience • Build customer relationships and greet customers and patients promptly and courteously • Actively seek to understand patients' and their family's (customers) expectations and issues 	<ul style="list-style-type: none"> • Patient and customer service satisfaction surveys within agreed targets • Use AIDET principles in all interactions • Issues are escalated to the manager and resolved in a timely manner
<p>Safety and Wellbeing</p> <p>Participate actively and positively in the area of health and safety to reduce all hazards and incidents within the workplace</p> <ul style="list-style-type: none"> • Report all hazards, incidents, injuries and near misses immediately to your manager and log them in RiskMan 	<ul style="list-style-type: none"> • Adhere to infection control/personal hygiene precautions • Implement and adhere to Epworth OHS policies, protocols and safe work procedures • Mandatory training completed at agreed frequency

7. Position Requirements/Key Selection Criteria

COMPONENT	
Qualifications	<p>Essential</p> <ul style="list-style-type: none"> • Bookkeeping qualifications and/or • Currently studying/recently completed a related course i.e. accounting, finance, economics, business, commerce and/or • Experience in a similar role
Previous Experience	<p>Essential</p> <ul style="list-style-type: none"> • Intermediate level data analysis and reporting experience • Intermediate level experience and knowledge of Excel • Dealing with multiple stakeholders • Managing independent workload <p>Desirable</p> <ul style="list-style-type: none"> • Work experience with a Research or Charity environment
Required Knowledge & Skills	<p>Essential</p> <ul style="list-style-type: none"> • Advanced data entry skills with accuracy and attention to detail • Intermediate understanding of finance processes, procedures & reporting • Demonstrated ability to undertake financial analysis and reporting • Demonstrated ability to coordinate and collate information • Working knowledge of computer applications • Demonstrated ability to communicate with various stakeholders • Demonstrated ability to prioritise deliverables
Personal Attributes & Values All employees are expected to consistently	<p>Essential</p> <ul style="list-style-type: none"> • Alignment to Epworth HealthCare's established Values & Behaviours • A positive, cooperative and collaborative team member

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<p>work in accordance with Epworth’s values and behaviours</p> <ul style="list-style-type: none"> • Compassion • Accountability • Respect • Excellence 	<ul style="list-style-type: none"> • High level operating skills (time management, decision making, planning, quality output) • Ethical approach to privacy & confidentiality • Sensitive to cultural, racial and gender differences • Demonstrated problem solving skills • A professional and engaging approach • Professional work ethic and flexible work style <p>Desirable</p> <ul style="list-style-type: none"> • A desire to share ideas & contribute towards process improvement
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Document Control

Date Developed:	Date Last Reviewed:	Developed and Reviewed By (Position Title):
4 th February 2026	4 th February 2026	Finance Manager – AMS/Research

8. Employee Position Declaration

I have read and understand the requirements and expectations of the above Position Description. I agree that I have the physical ability to fulfil the inherent physical requirements of the position, and accept my role in fulfilling the Key Accountabilities. I understand that the information and statements in this position description are intended to reflect a general overview of the responsibilities and are not to be interpreted as being all-inclusive.

Employee Signature: _____

Print Name: _____ Date: _____